



Employee Task Aid

Task Aid Titles

- Log On
- Forgot Password
- Request an Account Using the SAAR Form
- View User Record
- Edit User Record
- Edit Record via Advanced Form
- View Transcript Status
- Use Global Search
- Register for an OLT Course
- Register for Instructor-led Training (ILT)
- Withdraw from an ILT
- Indicate Interest in a Future Session
- Submit an Exception Request
- Request a Certification
- Request Education/Experience Verification
- Submit an Equivalency/Fulfillment Form
- Request External Training Credit
 - Within a Certification
 - From Transcript
- Create an IDP
- Create an IDP from Template
- Update an IDP
- View Submitted Forms

*To foster a high-performing,
qualified civilian acquisition
workforce.*



<https://www.fai.gov/>



FAI@mail.mil

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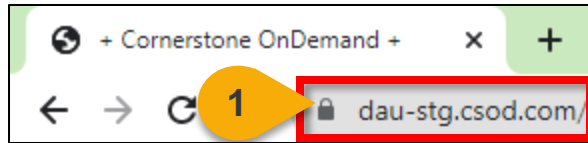
User Account Management



Log On

When you want to login...

Step 1: Go to URL: <https://dau-stg.csod.com> (do not use the Internet Explorer browser). You may want to log out of VPN before starting this process.

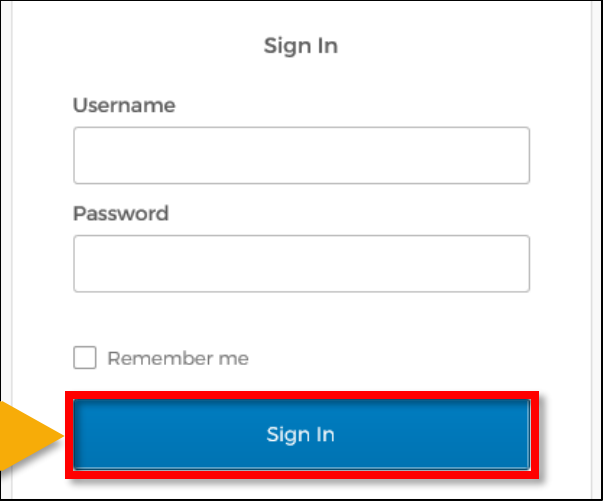


Step 2: The log on window will pop up. Enter your **Username** (your email) and **Password** in their respective fields.

A screenshot of the DAU Sign In window. The window has a white background with a grey border. At the top, the DAU logo is displayed in red. Below the logo is a grey silhouette of a person's head and shoulders. Underneath the silhouette is the text "Sign In". Below this, there are two input fields: "Username" and "Password". A red rectangular box highlights both input fields. A yellow callout bubble with the number "2" points to the "Username" field. Below the input fields is a checkbox labeled "Remember me". Below the checkbox is a blue button labeled "Sign In". Below the button is a horizontal line with the text "OR" in the center. Below the line is a blue button labeled "Sign in with CAC Card". At the bottom of the window is the text "Need help signing in?".

Log On (Cont.1)

Step 3: Click Sign In.



Sign In

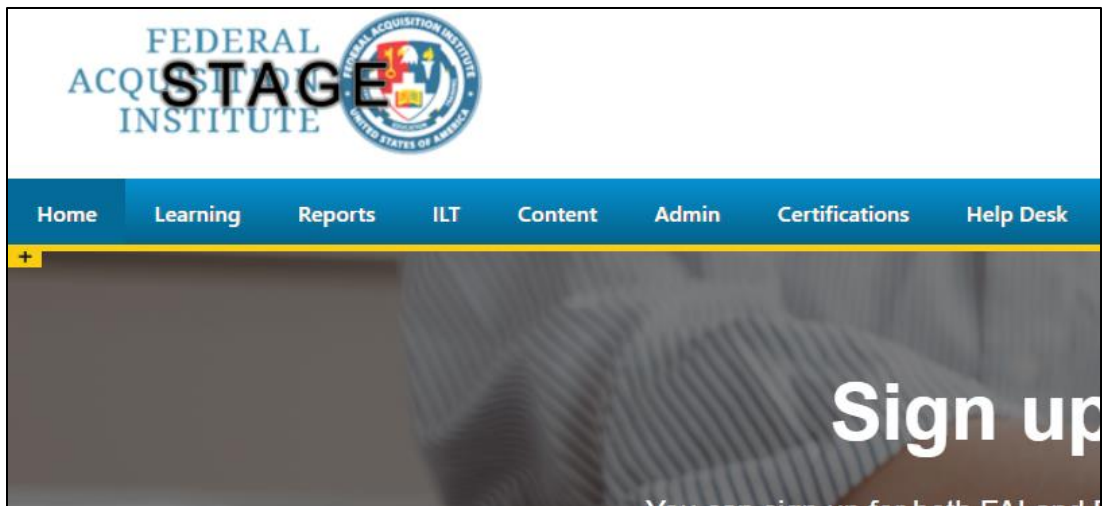
Username

Password

☐ Remember me

3 Sign In

Once you successfully complete the SSO log in process, CSOD should open with your organization's logo in the upper left corner.



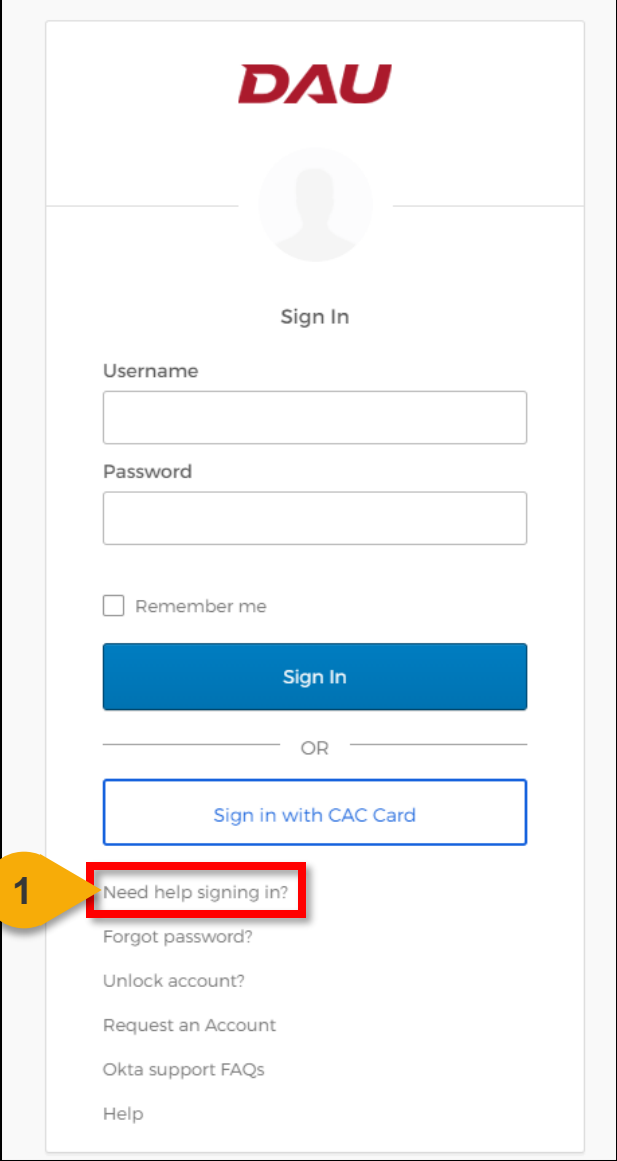
NOTE: If you receive an error message:

- Clear your cache
- Try a different browser
- Disconnect from the VPN

Forgot Password

When you can't log on...

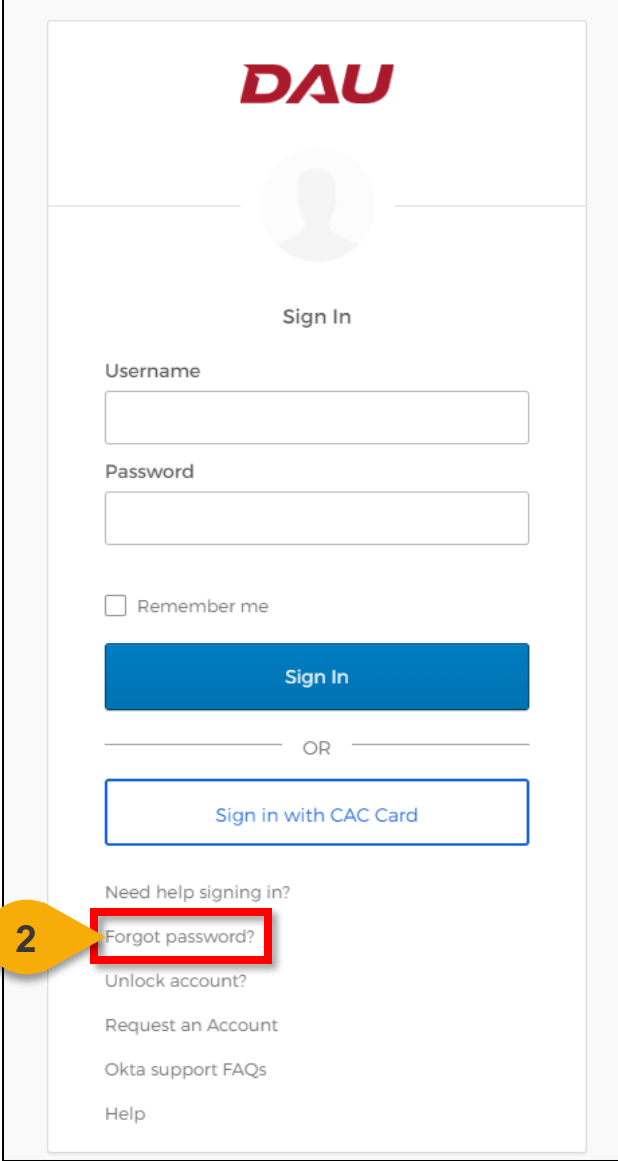
Step 1: If you need help signing in, select the **Need help signing in?** link at the bottom of the window.



The screenshot shows the DAU Sign In page. At the top is the DAU logo. Below it is a placeholder for a profile picture. The page is titled "Sign In". There are two input fields: "Username" and "Password". Below these is a checkbox labeled "Remember me". A blue "Sign In" button is present. Below the button is an "OR" separator. Under the separator is a button labeled "Sign in with CAC Card". At the bottom of the page, there is a list of links: "Need help signing in?", "Forgot password?", "Unlock account?", "Request an Account", "Okta support FAQs", and "Help". A yellow callout bubble with the number "1" points to the "Need help signing in?" link, which is also highlighted with a red rectangular box.

Forgot Password (Cont.1)

Step 2: If you already set up OKTA to reset your password, select the **Forgot Password?** option to have a new password/PIN sent to your email or phone.



The image shows the DAU (Department of Acquisition) Sign In page. At the top is the DAU logo in red. Below it is a grey silhouette of a person's head and shoulders. Underneath the silhouette is the text "Sign In". Below that are two input fields: "Username" and "Password". Below the password field is a checkbox labeled "Remember me". Below the checkbox is a blue button labeled "Sign In". Below the button is the word "OR" flanked by horizontal lines. Below "OR" is a blue button labeled "Sign in with CAC Card". Below the buttons is a list of links: "Need help signing in?", "Forgot password?", "Unlock account?", "Request an Account", "Okta support FAQs", and "Help". A yellow callout bubble with the number "2" points to the "Forgot password?" link, which is also highlighted by a red rectangular box.

Forgot Password (Cont.2)

Step 3: Select the OKTA support FAQs option and follow the directions for **Q2**.

3

Q2: HELP! I requested a password be sent to me via email, but there is not a password in the email I was sent. Where is my password?

DAU - Okta Password Reset Requested

Hi Teresa,

A password reset request was made for your Okta account. If you did not make this request, please contact the DAU Help Desk dauhhelp@dau.edu immediately.

If you require further assistance, please view the Okta support FAQs or contact the DAU Help Desk using the options below:

[Okta support FAQs](#)

Phone: [703-805-3459](tel:703-805-3459) | [866-568-6924](tel:866-568-6924) | DSN: 655-3459; All Option 1

Email: dauhhelp@dau.edu

A: If you have not completed the account setup process, you will not be able to use the self-service feature to reset your own password. You need to request the DAU Help Desk (DAUHelp@dau.edu) provide you with your login informatin so you can officially setup your account. Include the last 4 of your SSN/EIN/FIN when submitting this request so your account can be validated.

Step 4: Once you have the username and password entered, the list of systems you have access to will pop up. Select the **Virtual Campus Stage** button.

DAU Launch /

Work +

Office 365
Microsoft Office 365 Office Portal

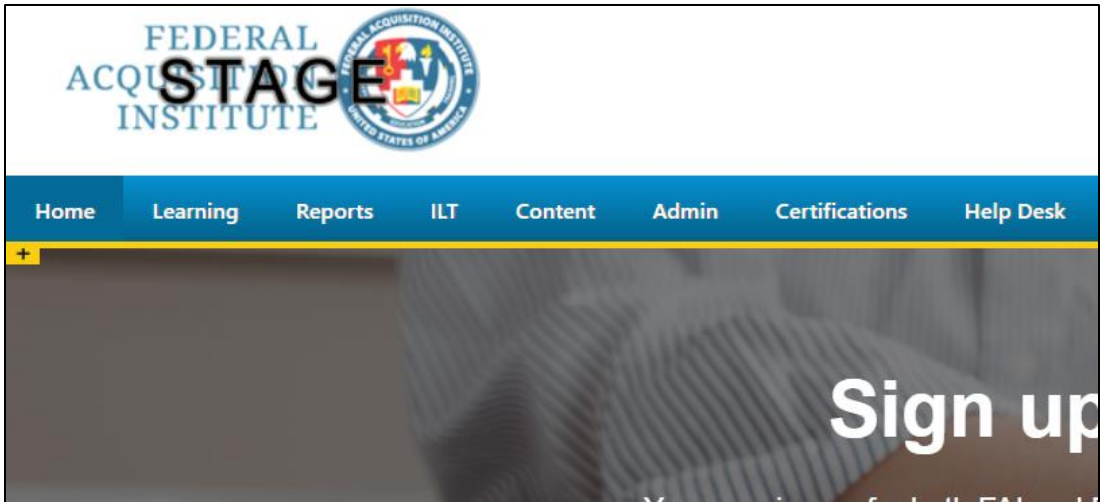
Virtual Campus Pilot

Virtual Campus Stage

4

Forgot Password (Cont.3)

Once you successfully complete the SSO log in process, CSOD should open with your organization's logo in the upper left corner.



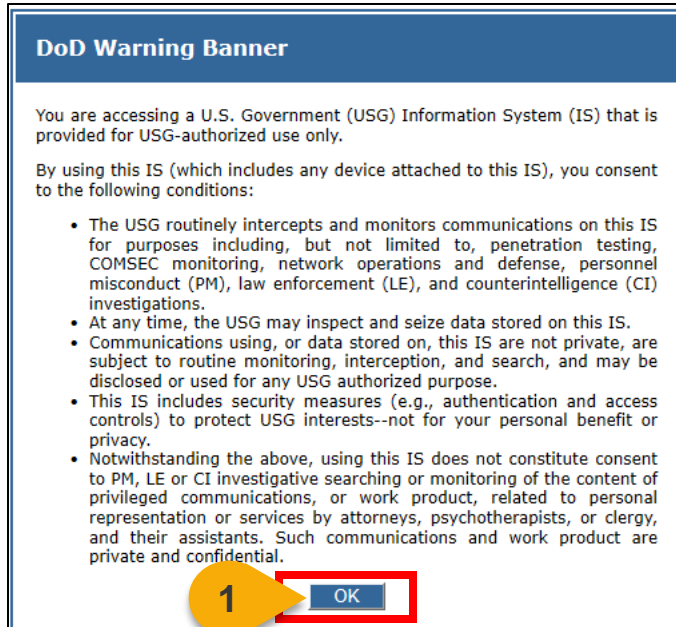
NOTE: If you receive an error message:

- Clear your cache
- Try a different browser
- Disconnect from the VPN

Request an Account Using the SAAR Form

When you need to complete the DAU SAAR for access to the Virtual Campus...

Step 1: Navigate to <https://saar.dau.edu>. You will see a DoD Warning Banner. Click "Ok".

A screenshot of a DoD Warning Banner. The banner has a blue header with the text "DoD Warning Banner". Below the header, the text reads: "You are accessing a U.S. Government (USG) Information System (IS) that is provided for USG-authorized use only. By using this IS (which includes any device attached to this IS), you consent to the following conditions:". A list of five conditions follows, detailing USG interception and monitoring capabilities, data inspection and seizure, routine monitoring of communications, security measures, and the non-constitution of consent for investigative searching. At the bottom right of the banner, there is a red-bordered button labeled "OK". A yellow callout bubble with the number "1" points to this button.

DoD Warning Banner

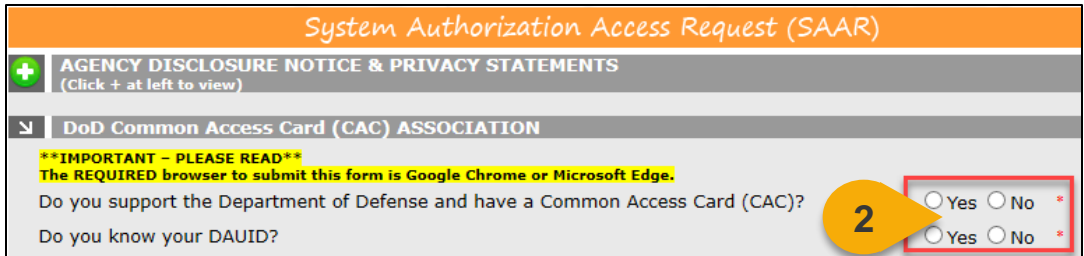
You are accessing a U.S. Government (USG) Information System (IS) that is provided for USG-authorized use only.

By using this IS (which includes any device attached to this IS), you consent to the following conditions:

- The USG routinely intercepts and monitors communications on this IS for purposes including, but not limited to, penetration testing, COMSEC monitoring, network operations and defense, personnel misconduct (PM), law enforcement (LE), and counterintelligence (CI) investigations.
- At any time, the USG may inspect and seize data stored on this IS.
- Communications using, or data stored on, this IS are not private, are subject to routine monitoring, interception, and search, and may be disclosed or used for any USG authorized purpose.
- This IS includes security measures (e.g., authentication and access controls) to protect USG interests--not for your personal benefit or privacy.
- Notwithstanding the above, using this IS does not constitute consent to PM, LE or CI investigative searching or monitoring of the content of privileged communications, or work product, related to personal representation or services by attorneys, psychotherapists, or clergy, and their assistants. Such communications and work product are private and confidential.

1 OK

Step 2: Click the **radio buttons** to answer the questions regarding having a DoD CAC and/or DAUID.

A screenshot of the System Authorization Access Request (SAAR) form. The form has an orange header with the text "System Authorization Access Request (SAAR)". Below the header, there are two sections: "AGENCY DISCLOSURE NOTICE & PRIVACY STATEMENTS" and "DoD Common Access Card (CAC) ASSOCIATION". The "DoD Common Access Card (CAC) ASSOCIATION" section contains a yellow box with the text "**IMPORTANT - PLEASE READ** The REQUIRED browser to submit this form is Google Chrome or Microsoft Edge." Below this, there are two questions: "Do you support the Department of Defense and have a Common Access Card (CAC)?" and "Do you know your DAUID?". Each question has two radio buttons: "Yes" and "No". A yellow callout bubble with the number "2" points to the "Yes" radio button for the first question.

System Authorization Access Request (SAAR)

AGENCY DISCLOSURE NOTICE & PRIVACY STATEMENTS
(Click + at left to view)

DoD Common Access Card (CAC) ASSOCIATION

****IMPORTANT - PLEASE READ****
The REQUIRED browser to submit this form is Google Chrome or Microsoft Edge.

Do you support the Department of Defense and have a Common Access Card (CAC)? ☐ Yes ☐ No *

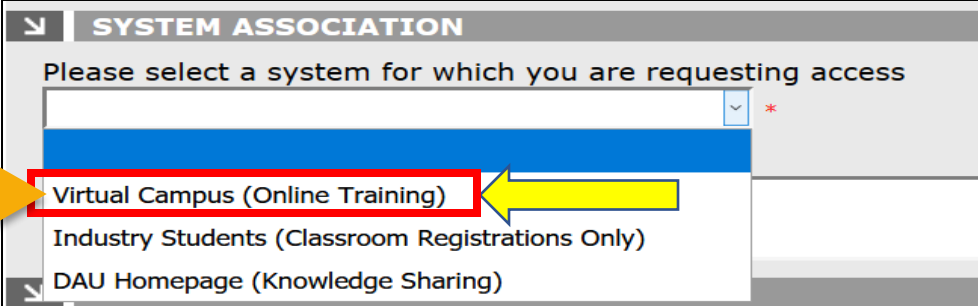
Do you know your DAUID? ☐ Yes ☐ No *

2

NOTE: If you support the Department of Defense and have a Common Access Card (CAC), the system can determine if there is already a DAUID associated to your information. If you select "Yes" and the system does find your account, the fields for your DAUID, Name, and Email address under PERSONAL DETAILS will automatically be filled in.

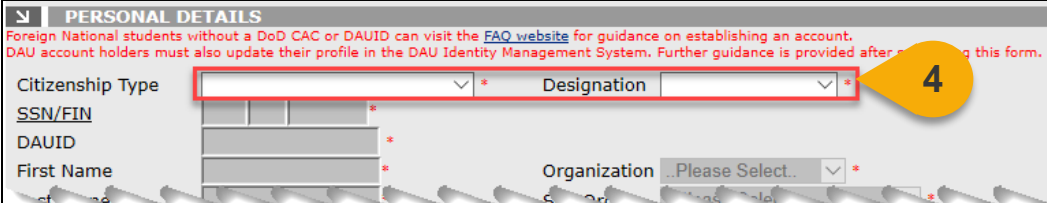
Request an Account Using the SAAR Form (Cont.1)

Step 3: Under SYSTEM ASSOCIATION you must select “**Virtual Campus (Online Training)**”. If you choose one of the other options, this will significantly delay the process to have an account created to take a course.



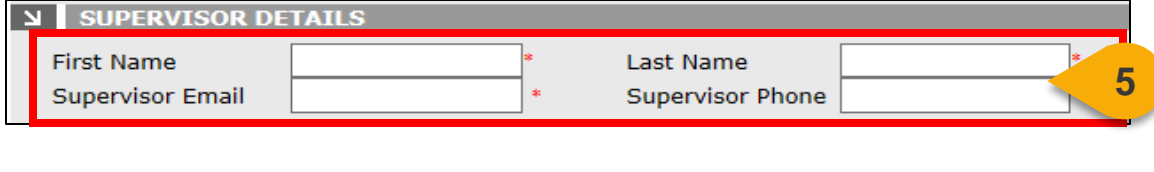
The screenshot shows the 'SYSTEM ASSOCIATION' section of a form. It contains a dropdown menu with the text 'Please select a system for which you are requesting access'. The dropdown is open, showing three options: 'Virtual Campus (Online Training)', 'Industry Students (Classroom Registrations Only)', and 'DAU Homepage (Knowledge Sharing)'. A yellow callout bubble with the number '3' points to the 'Virtual Campus (Online Training)' option, which is highlighted with a red box. A yellow arrow points from the callout to the option.

Step 4: Enter the required information in all fields that have not been grayed out.



The screenshot shows the 'PERSONAL DETAILS' section of the form. It includes a red warning message: 'Foreign National students without a DoD CAC or DAUID can visit the [FAQ website](#) for guidance on establishing an account. DAU account holders must also update their profile in the DAU Identity Management System. Further guidance is provided after submitting this form.' Below the message are several fields: 'Citizenship Type' (dropdown), 'Designation' (dropdown), 'SSN/FIN' (text), 'DAUID' (text), 'First Name' (text), 'Organization' (dropdown), and 'Supervisor' (text). A yellow callout bubble with the number '4' points to the 'Designation' dropdown, which is highlighted with a red box.

Step 5: Enter your **SUPERVISOR DETAILS**.



The screenshot shows the 'SUPERVISOR DETAILS' section of the form. It includes four fields: 'First Name' (text), 'Last Name' (text), 'Supervisor Email' (text), and 'Supervisor Phone' (text). A red box highlights the 'First Name' and 'Supervisor Email' fields. A yellow callout bubble with the number '5' points to the 'Supervisor Phone' field.

Request an Account Using the SAAR Form (Cont.2)

Steps 6 & 7: Read the USER AGREEMENT and check the “**I Agree**” box. Enter the code, which is not case sensitive, from the image in the box. You can select the green arrows to generate a new code or select the green sound image for the code to be vocalized. Afterwards select the “**Submit**” button.

The screenshot shows a web form titled "USER AGREEMENT". The text of the agreement is as follows: "I accept the responsibility for the information and DoD system to which I am granted access and will not exceed my authorized level system access. I understand that my access may be revoked or terminated for non-compliance with DoD security policies. I accept responsibility to safeguard the information contained in these systems from unauthorized or inadvertent modification, disclosure, destruction and use. I understand and accept that my use of the system may be monitored as part of managing the system, protecting against unauthorized access and verifying security problems. I agree to notify the appropriate organization that issued my account(s) when the access is no longer required."

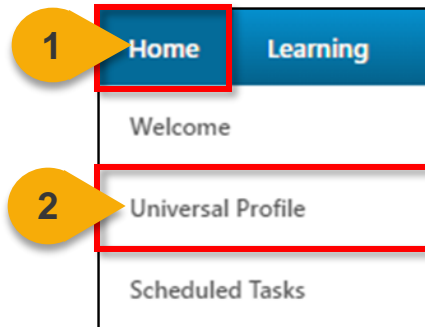
Below the text is a checkbox labeled "I Agree" with a red box around it and a yellow callout bubble with the number "6" pointing to it. To the right of the checkbox is a CAPTCHA image showing the code "30016" with a red box around it and a yellow callout bubble with the number "7" pointing to it. Below the CAPTCHA image is a text input field with the placeholder text "Type the code from the ir" and a red box around it. Below the input field is a red error message: "The code is not case sensitive." To the right of the input field is a "SUBMIT" button with a red box around it and a yellow callout bubble with the number "7" pointing to it. At the bottom of the form are two links: "Contact Us | Suggestion Box" and "DAU Help Desk 703-805-3459 | 1-866-568-6924".

IMPORTANT: If there was any information that was not filled in correctly, there will be red text in the area of the form that requires your attention for correction. Afterwards, you will need to select the “**I Agree**” check box again and enter the new code in the image box for your SAAR to be submitted. Select the “**Submit**” button once you have completed the form. Afterwards the screen below will be generated.

View User Record

When you want to view your User Record...

Steps 1 & 2: Hover over the **Home** tab, then select the **Universal Profile** tab. You will be taken to the User Record page.



Step 3: To expand a section, click on the **arrow** to the right of that section.

A screenshot of the User Record page. The 'Contact' section is expanded, showing fields for Phone, Email, Personal Email, and Mobile. The 'Settings' section is collapsed, indicated by a blue arrow. The 'Organization Structure' section is also collapsed, indicated by a blue arrow. A yellow callout bubble with the number '3' points to the blue arrow next to the 'Contact' section header.

Contact

Phone: Email:

Personal Email: Mobile:

Settings

Time Zone:

Organization Structure

Manager: HR Admin:

Dean or Director: **Organization:** Department of Education (9AL3)

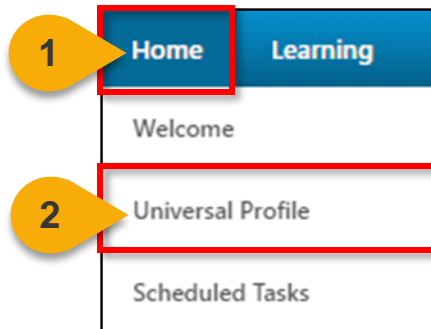
Position: Grade:

Location:

Edit User Record

When you want to edit information on the user record...

Steps 1 & 2: Hover over the **Home** tab, then select the **Universal Profile** tab. You will be taken to the User Record page.



Step 3: Click the **Edit Record** button at the bottom left side of the screen to edit your User Record.

To help FAI accurately report training data, it is important that the data you enter on this page is correct.
Click the **Edit** button at the bottom of this page to edit fields.

Name: FAI Employee	User Name: FAI_Employee
User ID: FAI_Employee	
Original Hire Date:	
Active Status: Active	

Edit Record

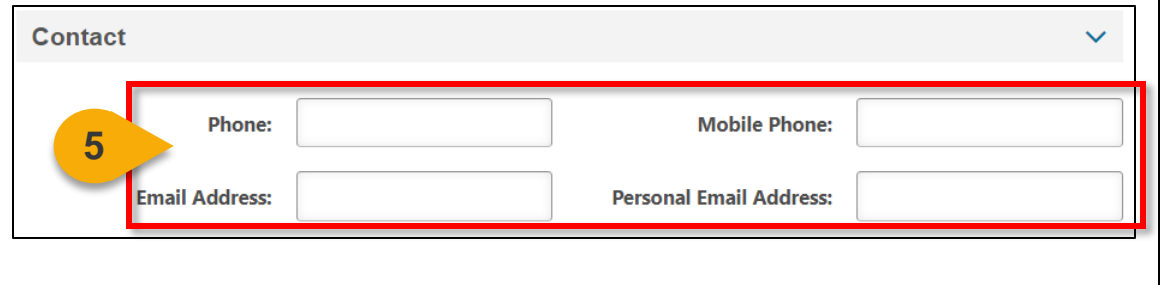
Step 4: In the first section at the top of the screen, you can edit your **First Name**, **Middle Name**, **Last Name**, and **User Name**.

Edit User Record

First Name: *	FAI
Middle Name:	
Last Name: *	Employee
User Name: *	FAI_Employee

Edit User Record (Cont.1)

Step 5: In the Contact section, you can fill in your **Phone, Mobile Phone, Email Address, and Personal Email Address.**



Contact

5

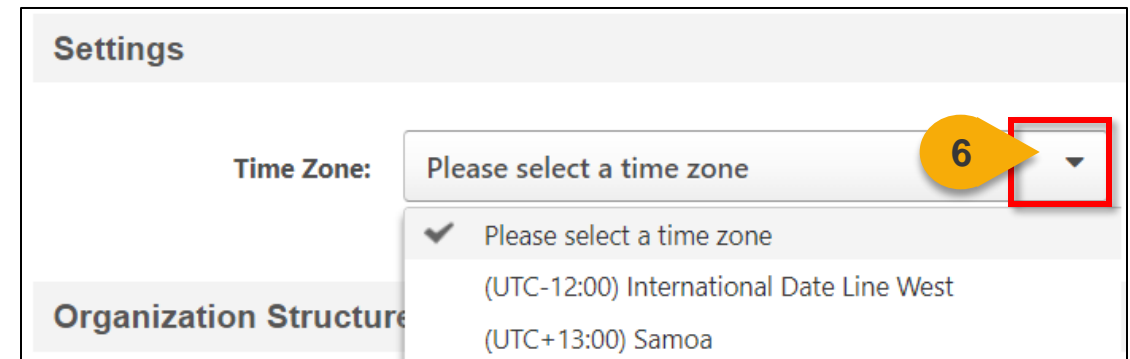
Phone:

Mobile Phone:

Email Address:

Personal Email Address:

Step 6: In the Time Zone section, you can click the dropdown to select the appropriate time zone for your location.



Settings

Time Zone: Please select a time zone

6

✓ Please select a time zone

(UTC-12:00) International Date Line West

(UTC+13:00) Samoa

Organization Structure

Step 7: In the Organization Structure section, you can input your **Manager, Dean or Director, Position, Location.**



Organization Structure

7

Manager:

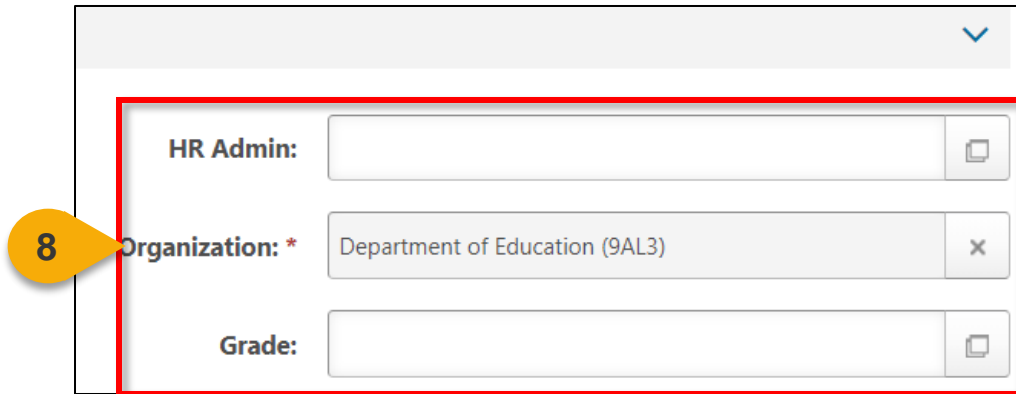
Dean or Director:

Position:

Location:

Edit User Record (Cont.2)

Step 8: In the Organization Structure, you can also edit the **HR Admin, Organization, and Grade.**

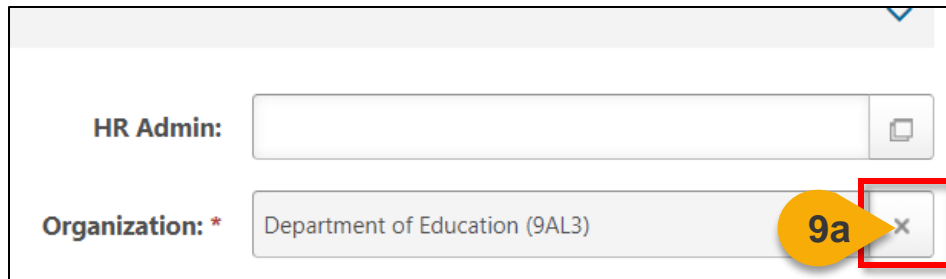


HR Admin:

8 Organization: * Department of Education (9AL3)

Grade:

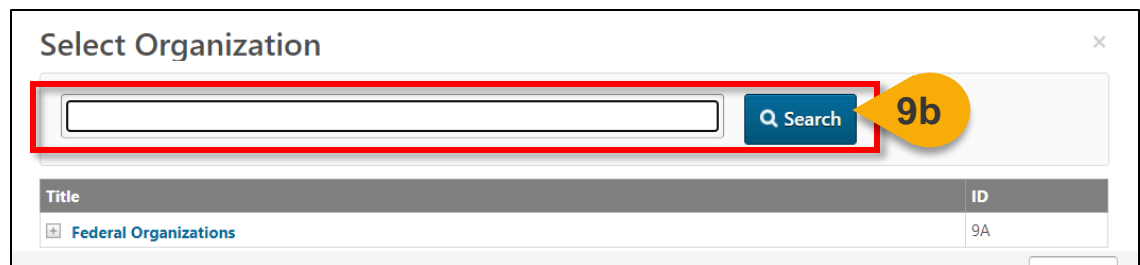
Step 9a: To search for your organization, Click on the **box** next to Organization. A popout box will appear.



HR Admin:

Organization: * Department of Education (9AL3)

Step 9b: You can manually enter the name of your organization in the **search box.**

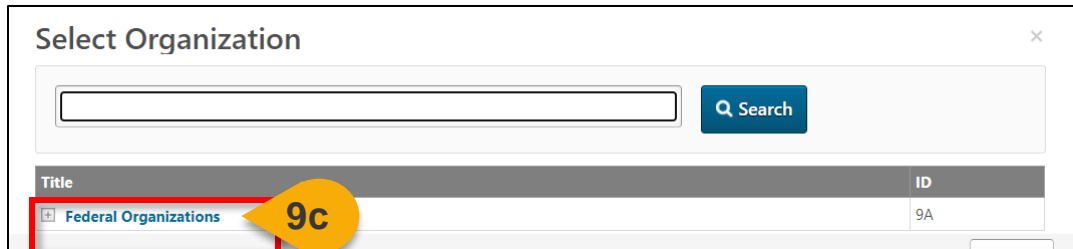


Select Organization

Title	ID
<input type="checkbox"/> Federal Organizations	9A

Edit User Record (Cont.3)

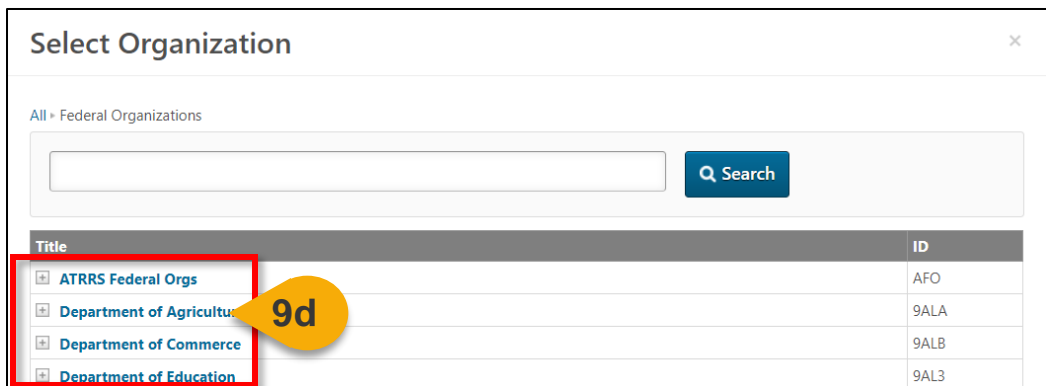
Step 9c: You can also click **Federal Organizations** to drill down to see more organizations and search manually.



Select Organization

Title	ID
<input checked="" type="checkbox"/> Federal Organizations	9A

Step 9d: Click on the name of your **organization** to add it to your User Record.



Select Organization

All » Federal Organizations

Title	ID
<input checked="" type="checkbox"/> ATRRS Federal Orgs	AFO
<input checked="" type="checkbox"/> Department of Agriculture	9ALA
<input checked="" type="checkbox"/> Department of Commerce	9ALB
<input checked="" type="checkbox"/> Department of Education	9AL3

Step 10: In the Other Demographics section, you have the option to fill in additional information on your demographics such as **Work City, Zip Code, Disability, etc.**



Other Demographics

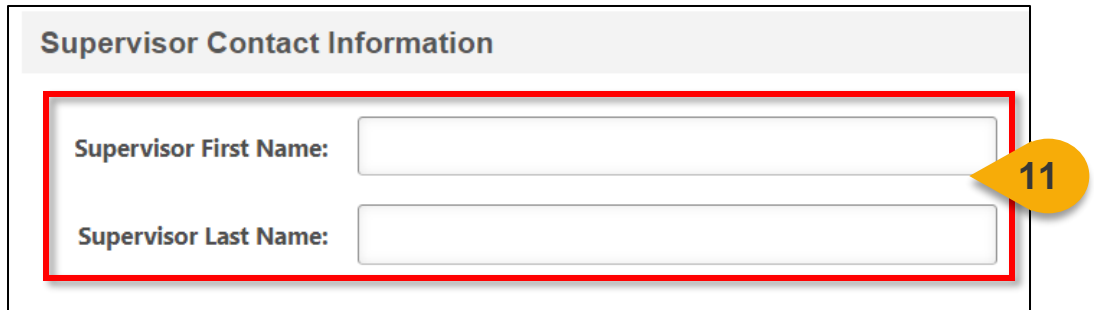
Work City:

Work Zip Code:

Disability: ☐

Edit User Record (Cont.4)

Step 11: In the Supervisor Contact Information section, you can fill in the **first and last name** of your supervisor.



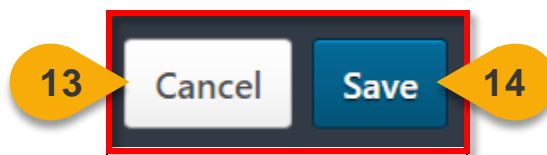
The image shows a form titled "Supervisor Contact Information". Inside the form, there are two input fields. The first field is labeled "Supervisor First Name:" and the second field is labeled "Supervisor Last Name:". A red rectangular box highlights both input fields. A yellow callout bubble with the number "11" points to the "Supervisor First Name:" field.

Step 12: In the Supervisor Contact Information section, you can also enter your **Supervisor's Phone and Email**.



The image shows the same "Supervisor Contact Information" form. Below the name fields, there are two more input fields. The first field is labeled "Supervisor Phone:" and the second field is labeled "Supervisor Email:". A red rectangular box highlights both input fields. A yellow callout bubble with the number "12" points to the "Supervisor Phone:" field.

Steps 13 & 14: Click **Save** to keep all the changes or click **Cancel** to discard the changes.

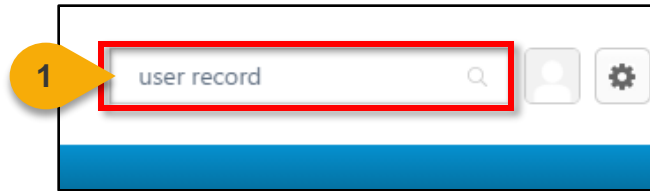


The image shows two buttons: "Cancel" and "Save". The "Cancel" button is white with a black border, and the "Save" button is blue with a white border. A red rectangular box highlights both buttons. A yellow callout bubble with the number "13" points to the "Cancel" button, and another yellow callout bubble with the number "14" points to the "Save" button.

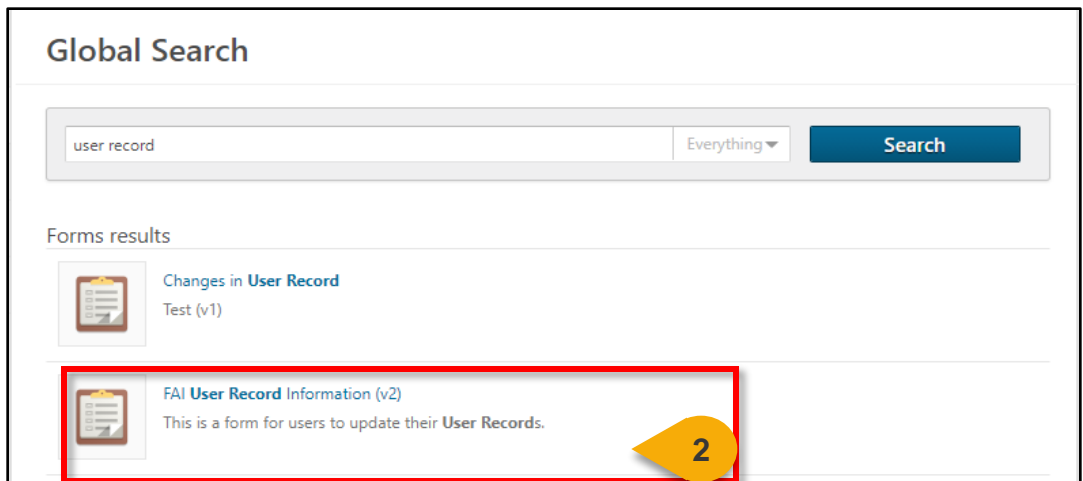
Edit User Record via Advanced Forms

When you want to edit the User Record using Advanced Forms...

Step 1: In the **Global Search** box, type “User Record” and click the magnifying glass.



Step 2: Select the **FAI User Record Information** form.



Edit User Record via Advanced Forms (Cont.1)

Steps 3 & 4: Fill in the form and click **Submit** at the bottom of the page when finished. Fields with a * are required. You will see the changes reflected on your User Record immediately.

FAI User Record Information (v2)

This is a form for users to update their User Records.

All fields marked with an asterisk are required.

3

First Name *

Middle Name

Last Name *

Suffix

Local System ID

Cancel

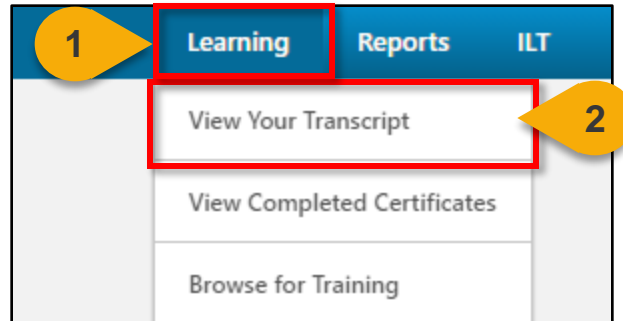
4

Submit

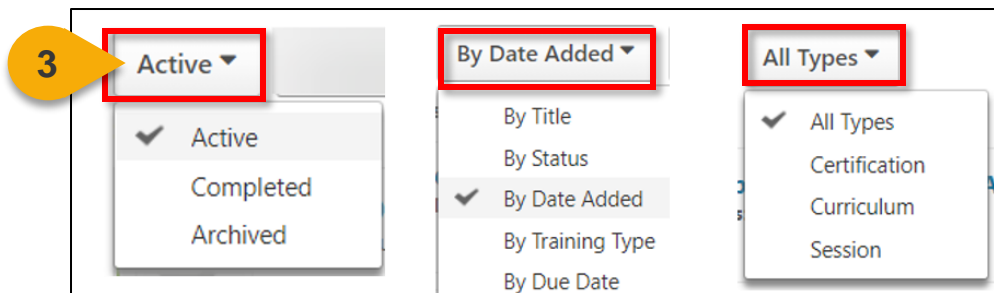
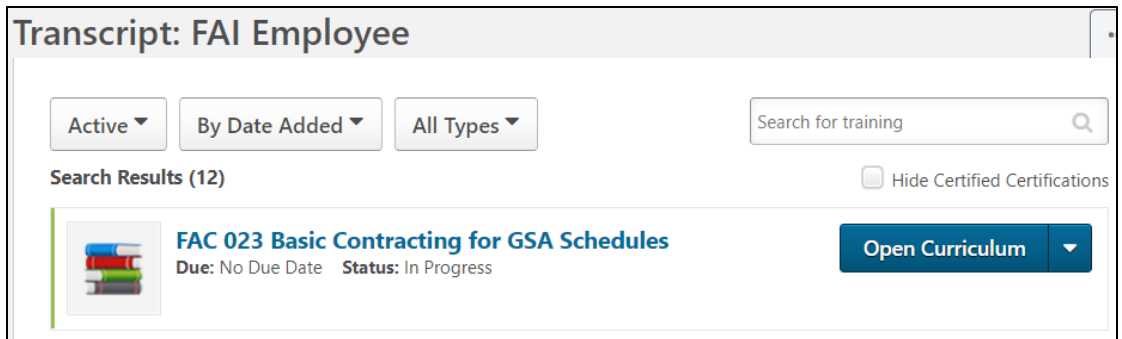
View User Transcript

When you want to view your Transcript...

Steps 1 & 2: Hover over the **Learning** tab and then select **View Your Transcript**.



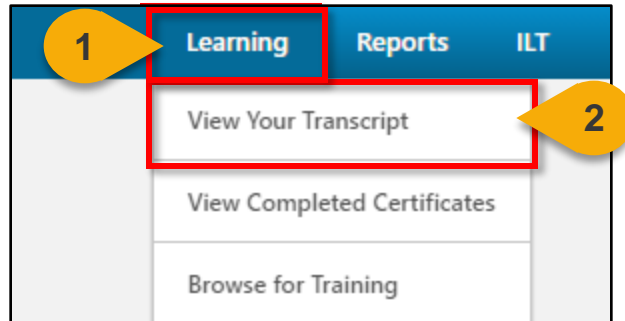
Step 3: You will be taken to your Transcript. You can click the **dropdown arrow** filter to show Active, Completed, and Archived courses. By default, only active courses you have not completed will be listed. Click on the **arrows** by each filter for dropdowns to sort the courses.



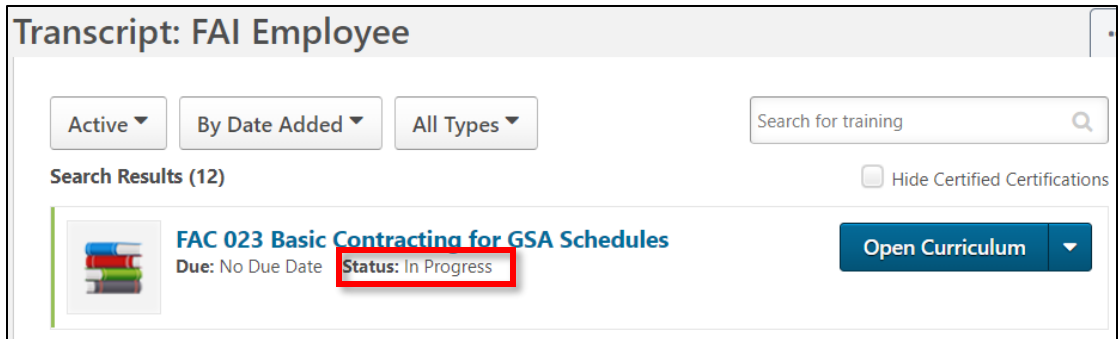
View Transcript Status

When you want to view your Transcript status...

Steps 1 & 2: Hover over the **Learning** tab and then select **View Your Transcript**.



Your Transcript will display in the screen. The **status** of your courses will be listed underneath the title of the course.



Use Global Search

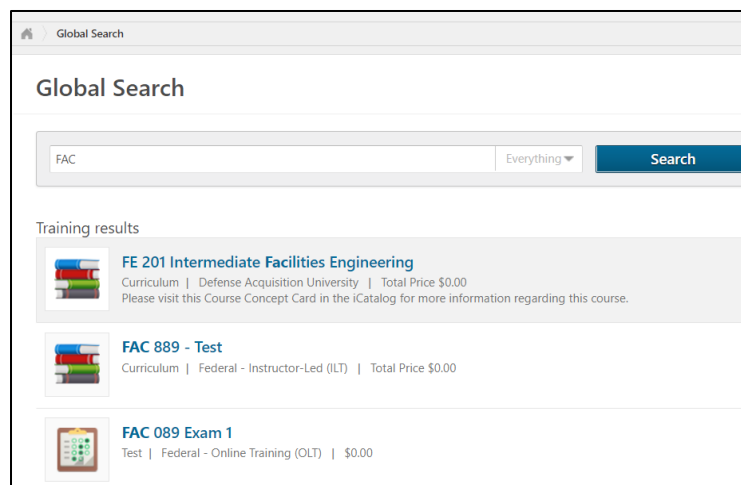
When you want to search for Training, Certifications, or Forms...

Global Search: This predictive search bar, found at the top right of the home page, helps users search for training, certification and forms.

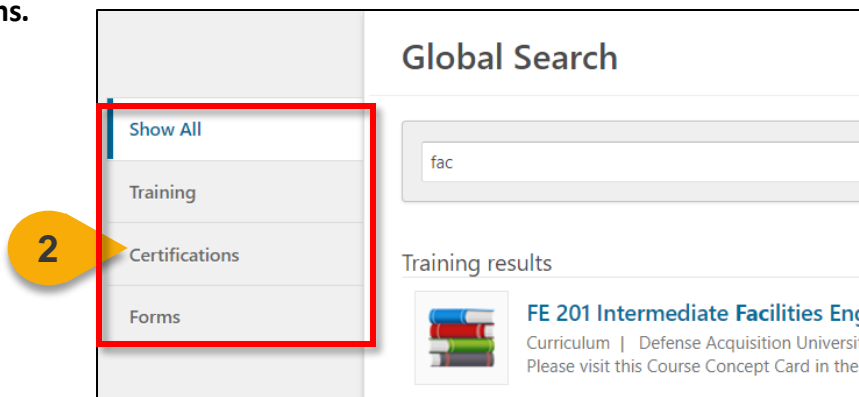
Step 1: Enter your desired Search Terms and click the **Magnifying Glass** or hit enter to search.



The page will refresh, and your results will be listed on the page.



Step 2: To the left of the search bar, you can choose to filter by **Training, Certifications, or Forms.**



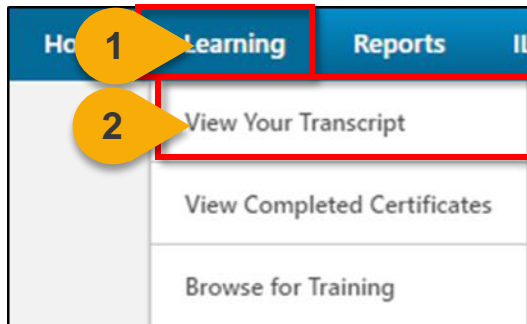
External Training



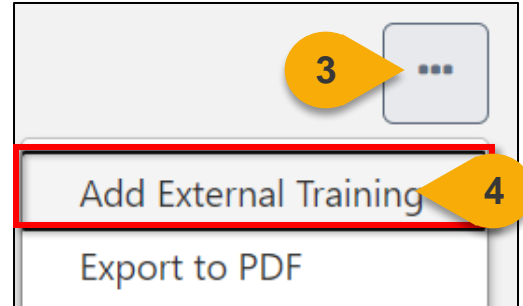
Request External Training Credit from Transcript

When you want to add an external training to your Transcript...

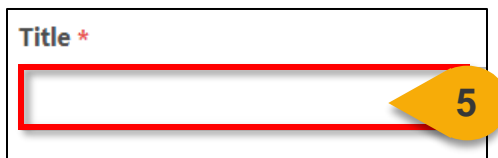
Steps 1 & 2: Hover over the **Learning** tab and click **View Your Transcript**.



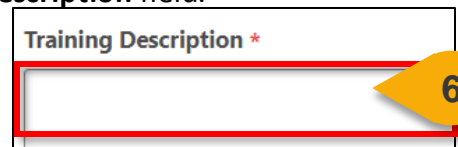
Steps 3 & 4: Click on the **ellipsis button** at the top left-hand corner. Then click on **Add External Training**.



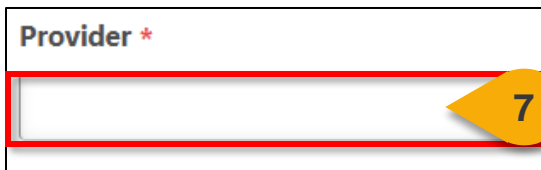
Step 5: Enter the title of your external training in the **Title** field.

A screenshot of a form field labeled 'Title *'. The field is empty and has a red border. A yellow callout '5' points to the field.

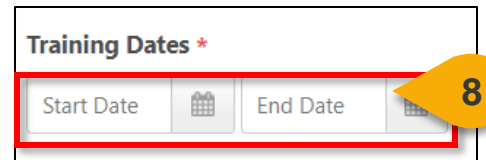
Step 6: Enter a description of the external training in the **Training Description** field.

A screenshot of a form field labeled 'Training Description *'. The field is empty and has a red border. A yellow callout '6' points to the field.

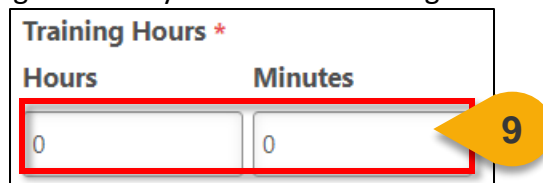
Step 7: Enter the name of the provider of the external training in the **Provider** field.

A screenshot of a form field labeled 'Provider *'. The field is empty and has a red border. A yellow callout '7' points to the field.

Step 8: Enter the start and end dates of your external training in the **Start Date** and **End Date** fields.

A screenshot of form fields labeled 'Training Dates *'. It contains 'Start Date' and 'End Date' fields, each with a calendar icon. A red box highlights both fields. A yellow callout '8' points to the fields.

Step 9: Enter the training hours for your external training in the respective **Hours** and **Minutes** fields.

A screenshot of form fields labeled 'Training Hours *'. It contains 'Hours' and 'Minutes' fields. Both fields have a red border and contain the number '0'. A yellow callout '9' points to the fields.

Request External Training Credit from Transcript (Cont.1)

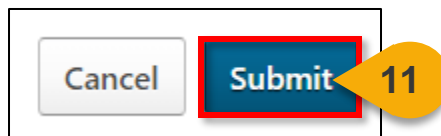
Step 10: Click **Select File** to add proof of your successful completion of your External Training.



Attachment(s) *

10 Select a file

Step 11: Click **Submit** to submit the form for approval.

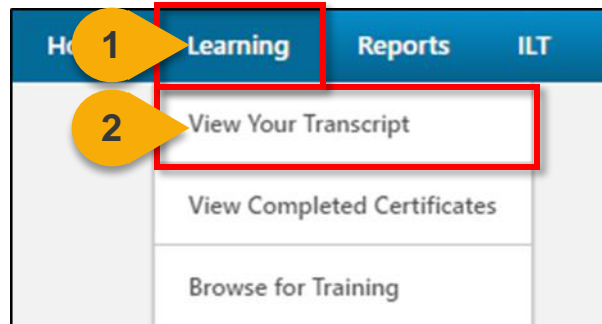


Cancel Submit 11

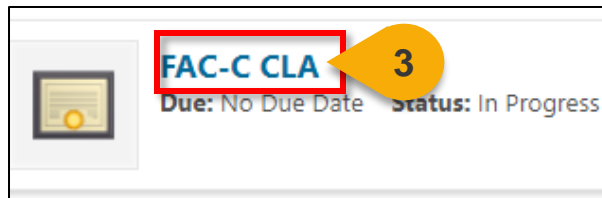
Request External Training Credit Within a Certification

When you want to request external credit from within the certification...

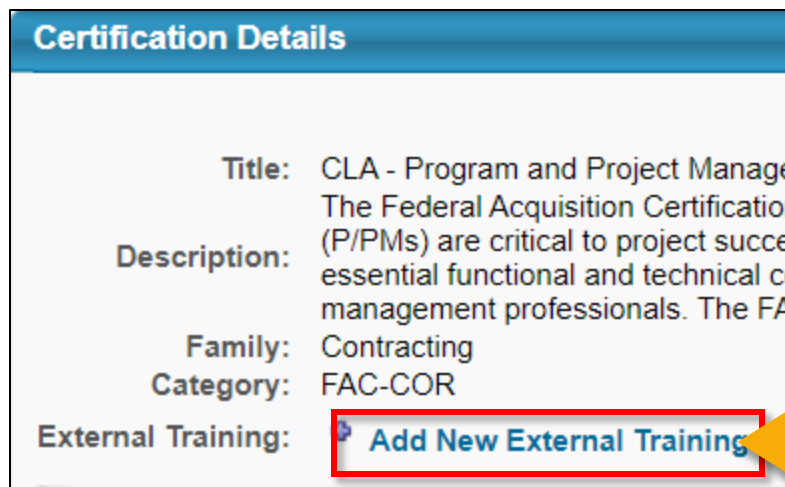
Steps 1 & 2: Hover over the **Learning** tab and click **View Your Transcript**.



Step 3: Click on the **title** of the certification where you want to add an external training.

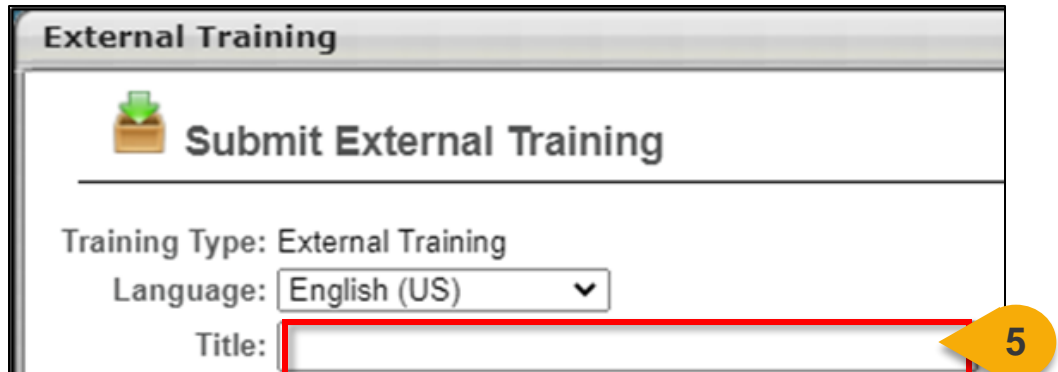


Step 4: Click on **Add New External Training**.

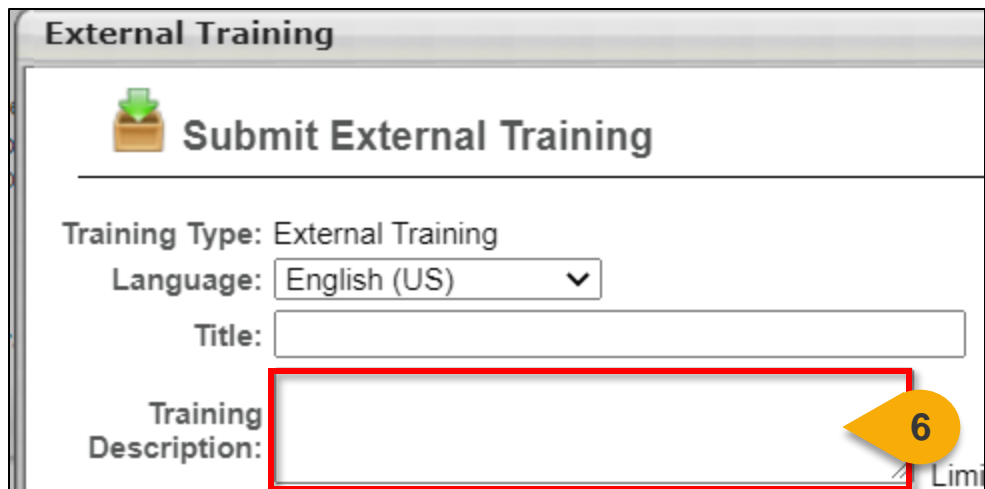


Request External Training Credit Within a Certification (Cont.1)

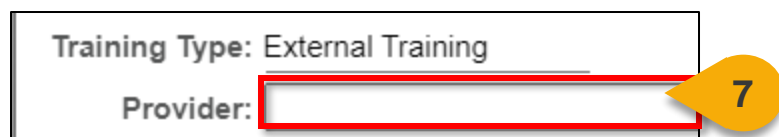
Step 5: A popup will appear. Enter the title in the **Title** field.



Step 6: Enter a description of the external training into the **Training Description** field.



Step 7: Enter the name of the institution into the **Institution** field.



Request External Training Credit Within a Certification (Cont.2)

Step 8: Enter the dates of your external training in the **Training Dates** field.

Training Dates: From To 8

Step 9: Enter the number of hours and minutes of the external training into the **Training Hours** text fields.

Training Hours: Hours Minutes 9

Step 10: Click the **dropdown button** next to the External Training category field

External Training Category: 10

Step 11: Select the applicable **type of training** from the External Training Category dropdown.

External Training Category: 11

- Select
- Select
- Training/Education
- Professional Organization/Events
- Publishing Articles
- Participation in Experiential Activities
- Other

Step 12: Enter the number of CLPs into the **FAI CLPs** field.

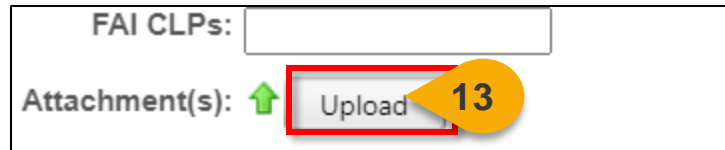
FAI CLPs: 12

Attachment(s):

Request External Training Credit Within a Certification (Cont.3)

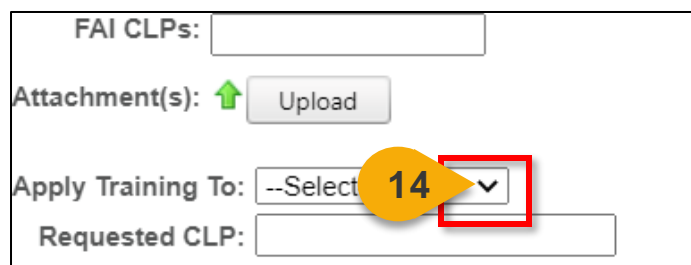
Step 13: Click **Upload** to add any supporting documents to the Attachments section if necessary.


FAI CLPs:

Attachment(s):  **Upload**

Step 14:: Click the **dropdown button** next to the Apply Training To field.

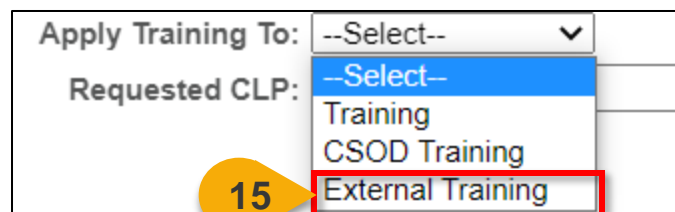
FAI CLPs:

Attachment(s): 

Apply Training To: --Select-- 

Requested CLP:

Step 15: Select **External Training** from the dropdown.

Apply Training To: --Select-- 

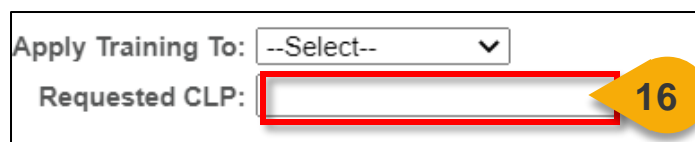
Requested CLP: --Select--

Training

CSOD Training

External Training

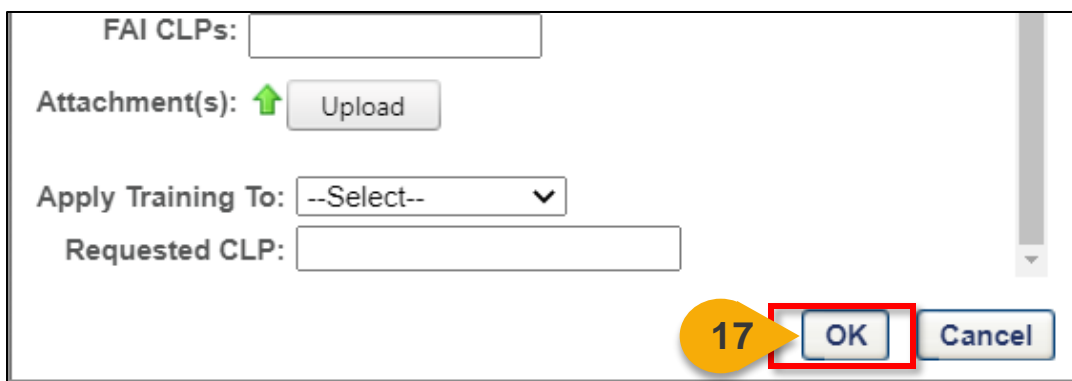
Step 16: Enter the **number of CLPs** earned in the Requested CLP field.

Apply Training To: --Select-- 

Requested CLP:

Request External Training Credit Within a Certification (Cont.4)

Step 17: Click **Ok** when you you've finished entering the information on your external training. This will submit the form to an External Training Approver.



The screenshot shows a web form for requesting external training credit. It includes the following fields and controls:

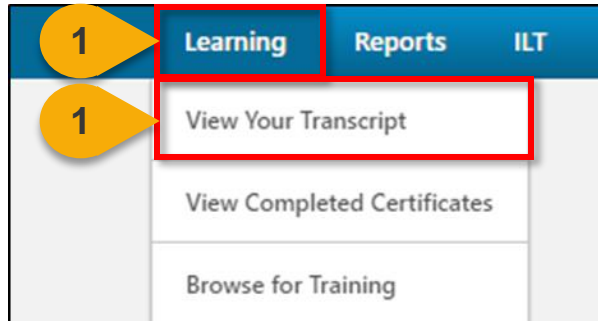
- FAI CLPs:** A text input field.
- Attachment(s):** A label with a green upward arrow icon and an **Upload** button.
- Apply Training To:** A dropdown menu currently showing **--Select--** with a downward arrow.
- Requested CLP:** A text input field.
- Buttons:** **OK** and **Cancel** buttons at the bottom right.

A yellow callout bubble with the number **17** points to the **OK** button, which is also highlighted with a red rectangular box.

Add External Training to a Certification

When you want to submit external training from your transcript to fulfill a certification requirement...

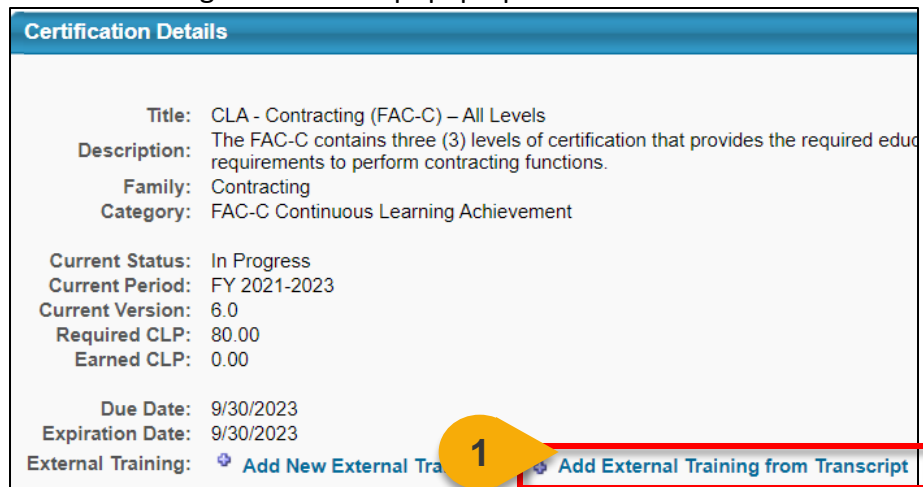
Steps 1 & 2: Hover over the **Learning** tab and then click **View Your Transcript**.



Step 3: Click on the **title** of the Certificate to which you'd like to add your external training.



Step 4: Click the **Add External Training from Transcript** link. This opens the Submit External Training from Transcript pop-up.



Add External Training to a Certification (Cont.1)

Step 5: Click the **dropdown** next to Select a Section to choose the section of the .certificate that the training will be applied to

External Training

Submit External Training From Transcript

Select a Section : External Training ▼

--Select--
Training
CSOD Training
External Training

Enter the number of credits earned for this item. If the credits are present, you may edit the amount before submitting for approval.

Step 6: Mark the **checkbox** next to the training item that you'd like to submit external training for.

External Training

Submit External Training From Transcript

Select a Section : CSOD Training ▼

Enter the number of credits earned for this item. If the credits are present, you may edit the amount before submitting for approval.

Select	Title	Status	CLP
<input checked="" type="checkbox"/>	Test	Complete	8.00

Step 7: In the **CLP** field to the right of the training item, enter the number of credits that were earned from the External Training.

External Training

Submit External Training From Transcript

Select a Section : CSOD Training ▼

Enter the number of credits earned for this item. If the credits are present, you may edit the amount before submitting for approval.

Select	Title	Status	CLP
<input checked="" type="checkbox"/>	Test	Complete	8.00

Add External Training to a Certification (Cont.2)

Step 8: Click **OK** to submit the training for approval. If multiple training items are selected, each item is submitted as a separate request to the certification owner, even though they are submitted at the same time.

External Training

Submit External Training From Transcript

Select a Section : CSOD Training ▼

Enter the number of credits earned for this item. If the credits are present, you may edit the amount before submitting for approval.

Select	Title	Status	CLP
<input checked="" type="checkbox"/>	Test	Completed	8.00

8 OK Cancel

Your External Training will be submitted for approval. The status of the training will be marked as **Completed(Evidence Needed)** until approved.

CERTIFICATION		
TITLE	CLP	STATUS
Training (Required CLP: Min = 80.00, Max = 80.00 / A		
CSOD Training (Required CLP: Min = 0.00, Max = 8		
Test	8.00	Completed (Evidence Needed)
CLM 090 Sustainable Military Facilities	8.00	Completed
CLM 092 Master Planning Energy and Sustain	8.00	Not Activated

Online Training



Register for Online Training (OLT)

When you want to register for Online Training...

Step 1: Type the name of the OLT you would like to take into the Global Search box and click the **magnifying glass** or hit enter.




Search


Step 2: Your search results will appear on the next page. Click the **title** of the OLT you would like to take.

Global Search

Training results



FAC 068 Contract Types
Curriculum | Federal - Online Training (OLT) | Total Price \$0.00
Develop an understanding of the most common contract types and their basic characteristics as well as factors to consider when selecting and negotiating the contract type.



FAC 057 COR Refresher
Curriculum | Federal - Online Training (OLT) | Total Price \$0.00
This module provides a refresher of the duties, roles and responsibilities of the Contracting Officer's Representative (COR) in the contract pre-award phase, and the contract administration and management phase. Module 1 provides an overview of these elements, while Module 2 is an interactive, scenario-based exercise that allows the COR to apply im...

Step 3: Click the **Open Curriculum** button to register for the OLT. The course will then be added to your Transcript with a status of Registered.

CURRICULUM

FAC 057 COR Refresher

Last Updated 11/19/2020


Details

This module provides a refresher of the duties, roles and responsibilities of the Contracting Officer's Representative (COR) in the contract pre-award phase

CURRICULUM

FAC 057 COR Refresher

Open Curriculum ▼



FAC 057 COR Refresher
Due: No Due Date **Status: Registered**

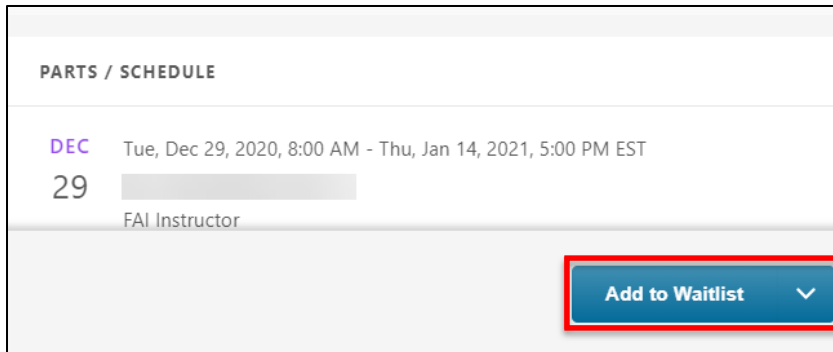
Open Curriculum ▼

Submit an Exception Request

When you want to submit an Exception Request for a course prerequisite...

You will submit an Exception Request when you would like to register for a Session that has a prerequisite requirement that you do not meet. If granted, this request will allow you attend the course without having the prerequisite on your Transcript.

Step 1: Select the Session you would like to join and click **Add to Waitlist** or **Request**.

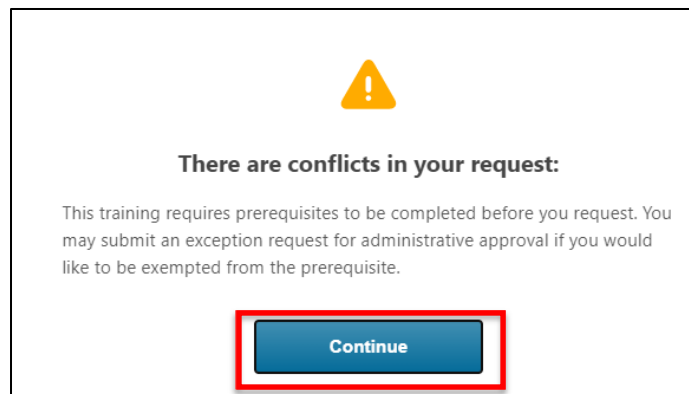


PARTS / SCHEDULE

DEC 29 Tue, Dec 29, 2020, 8:00 AM - Thu, Jan 14, 2021, 5:00 PM EST
FAI Instructor

Add to Waitlist

Step 2: A Warning will pop-up. Select **Continue** to submit an Exception Request.

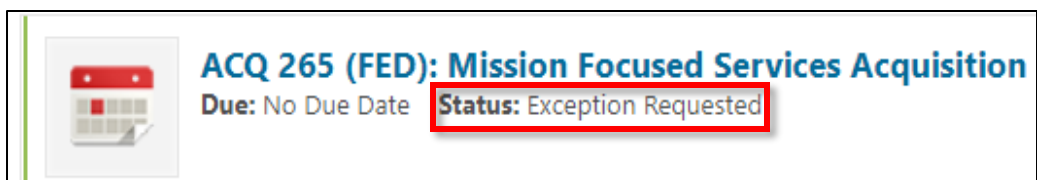


There are conflicts in your request:

This training requires prerequisites to be completed before you request. You may submit an exception request for administrative approval if you would like to be exempted from the prerequisite.

Continue

Step 3: The status for the session will change to **Exception Requested** on your transcript.



ACQ 265 (FED): Mission Focused Services Acquisition

Due: No Due Date Status: Exception Requested

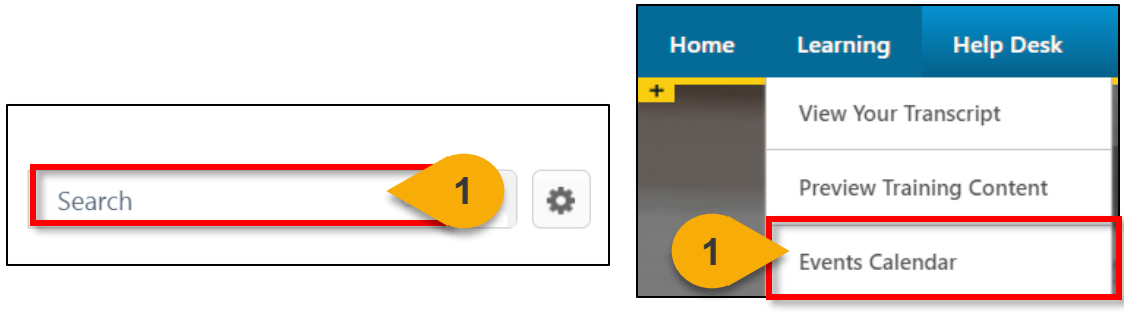
Instructor- Led Training



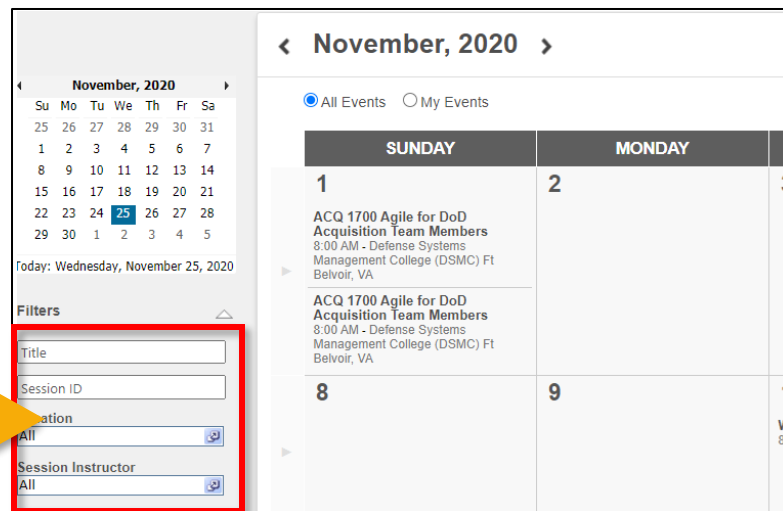
Register for Instructor-Led Training (ILT)

When you want to register for an Instructor Led Training...

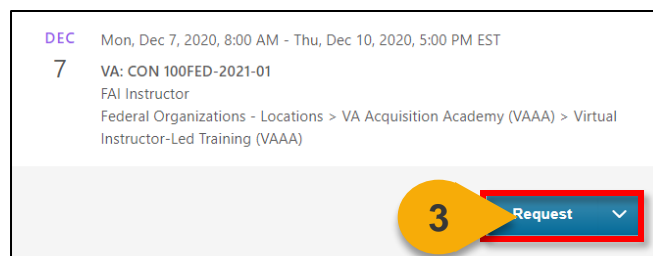
Step 1: Use **Global Search** or **Events Calendar** to find the instructor-led training course you'd like to take.



Step 2: On the Events Calendar, you can search by Title, Session ID, Subject, or Instructor.



Step 3: The Event will be displayed on the screen. You will see any available Sessions. Next to the desired Session, click on **Request**.



Indicate Interest in a Future Session

When interested in a course once new Sessions become available...

Steps 1 & 2 : Using **Global Search**, search for the Event you'd like register for. Click on the **Event Title**.

Global Search

What would you like to search for? Training Search

Refine search

Training results (132)

CMC 200 Fees, Financing, and Payments

Event | Defense Acquisition University | \$0.00

Please visit this Course Concept Card in the iCatalog for more information regarding this course. You can apply for this course at <https://www.dau.edu/training/p/apply-for-a-course>

Step 3: On the on the Event page, click either the **Notify Me** or **Notify Me of New Sessions** button.

Notify Me

EVENT

Select a Session

Save for Later

Notify Me of New Sessions

Step 4: You have the option to select to be notified of Sessions held in a specific location. Enter the **Location** field to do this.

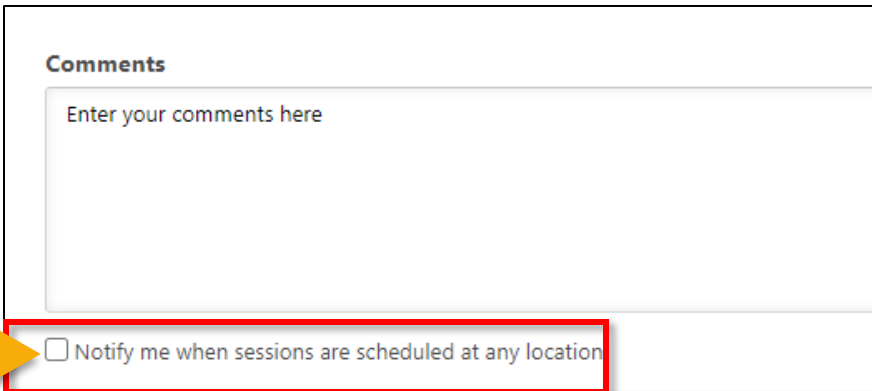
Interest Tracking

Location

Select a Location

Indicate Interest in a Future Session (Cont. 1)

Step 5: Enter any comments and to be notified for all sessions in any location, check the box next to **“Notify me when sessions are schedule at any location”**.



The screenshot shows a form titled "Comments" with a text input area labeled "Enter your comments here". Below the input area, a checkbox is labeled "Notify me when sessions are schedule at any location". A red rectangular box highlights the checkbox and its label. A yellow callout bubble with the number "5" points to the checkbox.

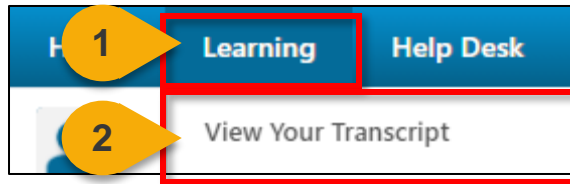
Step 6: Once you have completed selecting the location preferences, click the **Submit** button at the bottom of the page.



Withdraw from an ILT

When you need to withdraw from an ILT course...

Steps 1 & 2: Hover over the **Learning** tab and select **View Your Transcript**.



Step 3: Search and find the course you wish to withdraw. Select **Withdraw**.



Step 4 & 5: Select a reason for withdrawal and then click **Submit**.

A screenshot of the 'Withdraw Registration' form. At the top, it says 'If you withdraw your registration for this session, you will immediately be withdrawn from the roster.' Below this is a section titled 'Session Details' with the following information: Event Name: Con 100 (FED): Shaping Smart Business Arrangements, Date / Time: (1) 12/7/2020 8:00 AM - 12/10/2020 5:00 PM, Location: Virtual Instructor-Led Training (VAAA), Price: \$0.00. Below this is a section titled 'SESSION WITHDRAWAL OPTIONS'. A dropdown menu is open, showing a list of reasons for withdrawal: 'Please select a reason', 'Please select a reason', 'Other', 'Illness/Family Emergency', 'Inclement Weather', 'Leave', 'No Longer Needed', 'Reschedule Due to Conflict', 'TDY', 'Technology Issue', and 'Workload'. A yellow callout bubble with the number '4' points to this dropdown menu. At the bottom of the form are two buttons: 'Submit' and 'Cancel'. A yellow callout bubble with the number '5' points to the 'Submit' button.

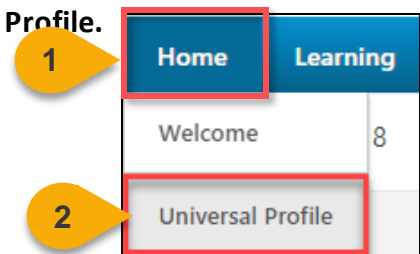
Checklists and Forms



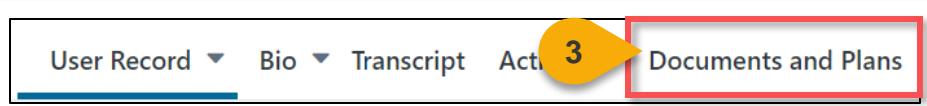
View Submitted Forms

When you want to see the forms you've submitted...

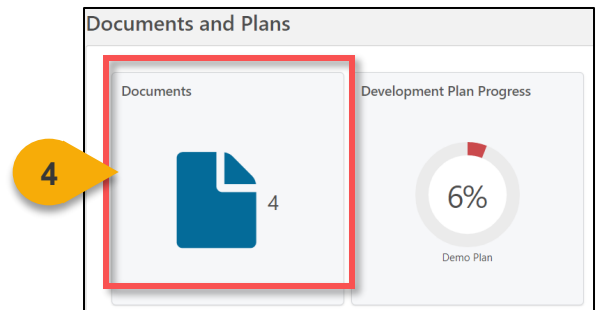
Steps 1 & 2: Hover over **Home** and click **Universal Profile**.



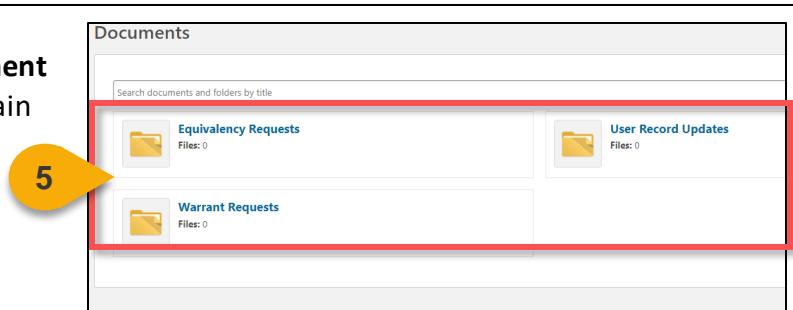
Step 3: Click on **Documents and Plans**.



Step 4: On the Documents and Plans page, click **Documents**.



Step 5: On the Documents page, you view your **document folders** and see which contain files.



Equivalent Requests:
Contains
Equivalent/Fulfillment
Forms you have submitted.

Warrant Requests:
Contains Warrant Forms
you have submitted.

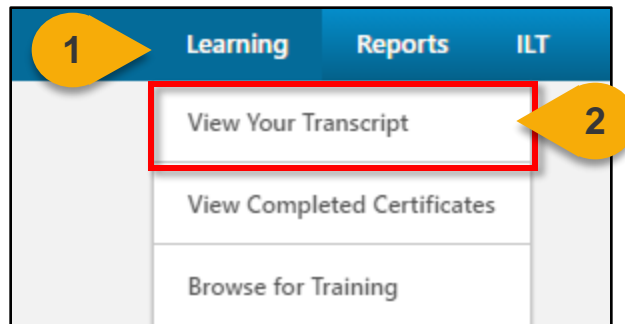
User Record Updates:
Contains User Record
Update Forms you have
submitted.

Request Education/Experience Verification

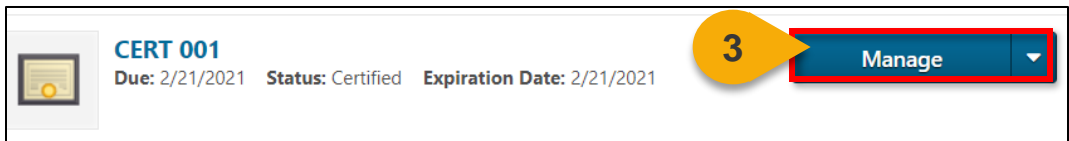
When you need to submit an Education or Experience Verification Checklist for a Certification...

Experience and Education Verification Checklists are used to validate experience and education requirements for Certifications.

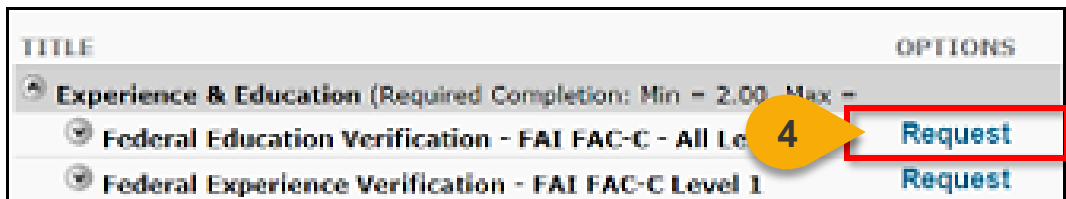
Steps 1 & 2: Hover over the **Learning** tab and click **View Your Transcript**.



Step 3: Click **Manage** next to the certification that you've completed



Step 4: Scroll down until you see **Experience and/or Education Verification** and click **Request**.



Request Education/Experience Verification (Cont.1)

Step 5: After you click on Request. A popup will appear, click **Request** again.

Federal Education Verification - FAI FAC-C - All Levels

☒ **Federal Education Verification - FAI FAC-C - All Levels**

Observation Checklist

Details

Description: Please follow the instructions below to attach documents for this requirement.

1. Click the **Attachments** tab
2. Choose the file you wish to upload.
3. Click **Add**. You can upload up to 3 files.

5 **Request** **Close**

Step 6: Click on **View Checklist**.

CERTIFICATION

TITLE

OPTIONS

6 **View Checklist**

Step 7: Click on **Checklist Summary** to view the overall progress of any checklists associated with a certification.

My Checklists

Birdie Winters

7 **Checklist Summary**

Checklist Report

Checklist Summary

Overall Progress **All Competencies**

☐ Show Completed

Name	Status	Rating/Score	Progress
Federal Experience Verification - FAI FAC P/PM Entry Level	Not Started	-	0%
Federal Experience Verification - FAI FAC P/PM Senior Level	Not Started	-	0%

Request Education/Experience Verification (Cont.2)

Step 8: Click on **Federal Education/ Experience Verification** to view instructions for the checklist.



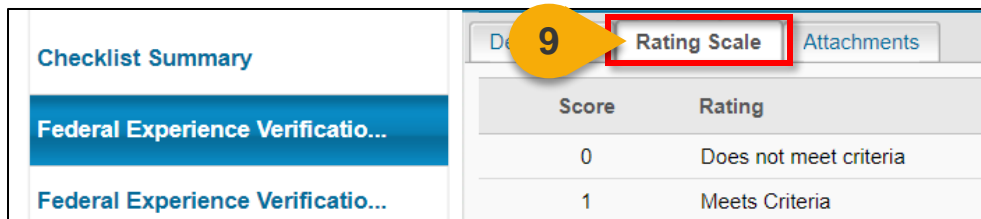
Checklist Summary

Federal Experience Verification...

Checklist Summary

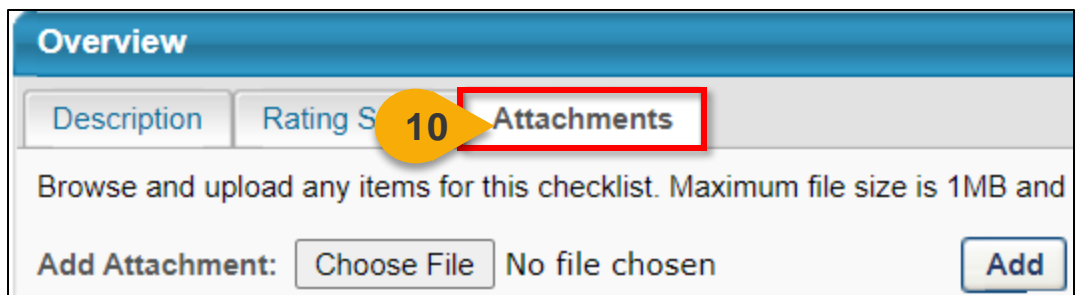
Federal Education Verification...

Step 9: Click on the **Rating Scale** tab to view the rating scale for the checklist.



Score	Rating
0	Does not meet criteria
1	Meets Criteria

Step 10: Click on the **Attachments** tab to upload any necessary documents for the checklist verifier to review.



Overview

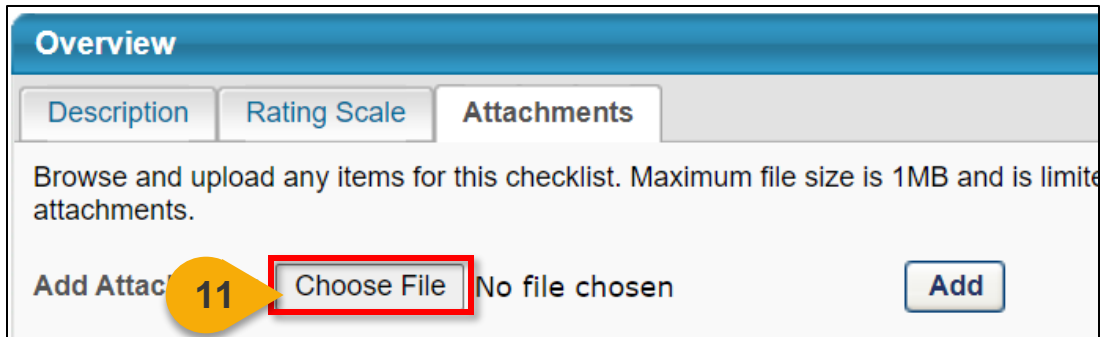
Description Rating Scale Attachments

Browse and upload any items for this checklist. Maximum file size is 1MB and

Add Attachment: Choose File No file chosen Add

Request Education/Experience Verification (Cont.3)

Step 11 : Click **Choose File** to add a copy of your resume or other relevant documents.



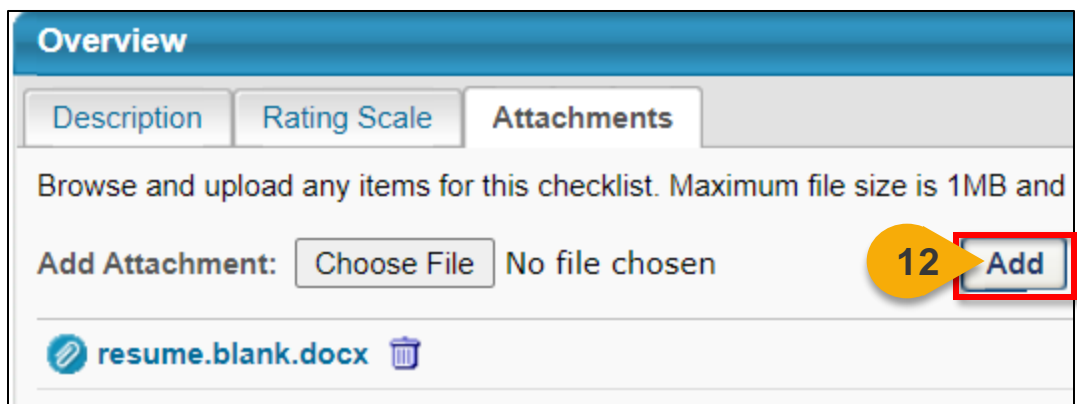
Overview

Description Rating Scale Attachments

Browse and upload any items for this checklist. Maximum file size is 1MB and is limited to 3 attachments.

Add Attachment **11** Choose File No file chosen Add

Step 12 : After you select the file, click **Add** to add the file to your Checklist.



Overview

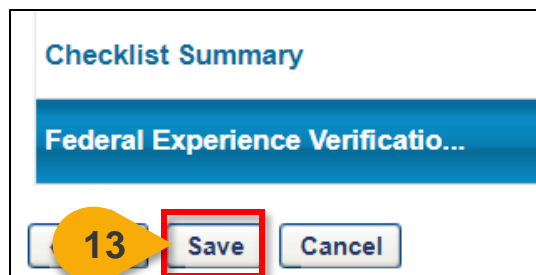
Description Rating Scale Attachments

Browse and upload any items for this checklist. Maximum file size is 1MB and is limited to 3 attachments.

Add Attachment: Choose File No file chosen **12** Add

resume.blank.docx

Step 13: Once all the desired attachments have been added (up to 3), click **Save**. The Checklist will be routed for approval.



Checklist Summary

Federal Experience Verification...

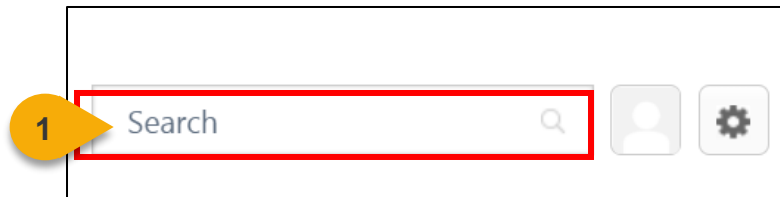
13 Save Cancel

Submit an Equivalency/Fulfillment Form

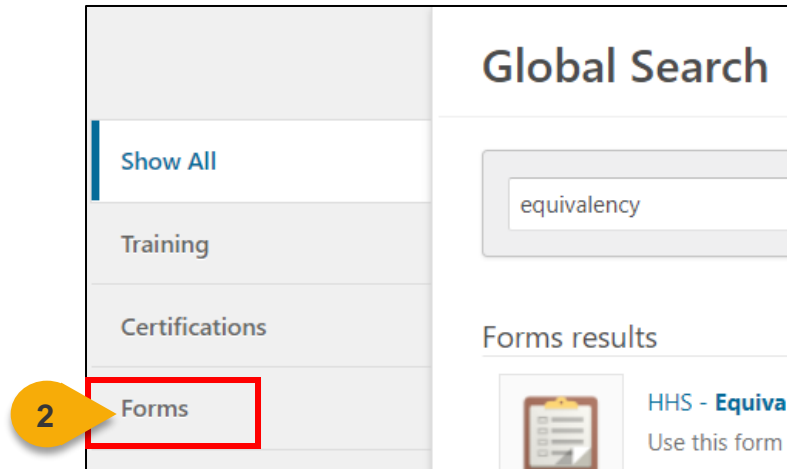
When you want to request Equivalency or Fulfillment for a Course...

Use Global Search to find the Equivalency/Fulfillment form.

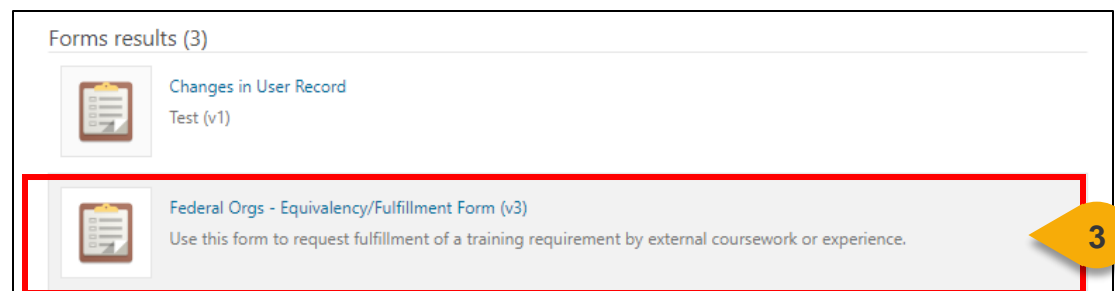
Step 1: Enter **Equivalency** in the Search box and click the Magnifying Glass.



Step 2: Click on **Forms**.



Step 3: Click on the **Equivalency/Fulfillment Form** for your agency.





Submit an Equivalency/Fulfillment Form (Cont.1)

Step 4: Select the **dropdown arrow** to choose the course for which you would like an equivalency.


Equivalency & Fulfillment Request
Please provide the information below to indicate how you have fulfillment requirements for course equivalency.


Please Select the Course You Would Like Equivalency For


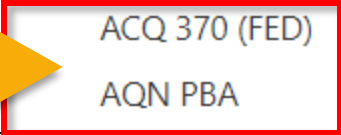
Select  

Step 5: Select the **course** from the dropdown menu.

Please Select the Course You Would Like E

Select 

✓ Select 


 

ACQ 370 (FED)
AQN PBA



Step 6: If the course you are trying to request an equivalency for is not available, you can enter it in the **Other** textbox.

Equivalency & Fulfillment Request
Please provide the information below to indicate how you have fulfillment requirements for course equivalency.

Please Select the Course You Would Like Equivalency For

Select 

If You Selected "Other", Please List.


 

Submit an Equivalency/Fulfillment Form (Cont.2)

Step 7: Click the **calendar** icon to enter the Training Start and End dates.


7

Training Start Date:



Select the equivalent training start date.


Training End Date:



Select the equivalent training end date.

Step 8: Click **Select File** to add any supporting documentation.

If Requesting Course Equivalency, Attach Course Completion Certificate Here.

Drag and drop file **8** 


Step 9: Enter any supporting comments in the **Employee Remarks** field.

9

Employee Remarks:

2000 characters maximum.

Step 10: Click **Submit for Approval** to route to Equivalency and Fulfillment Approvers.

10 

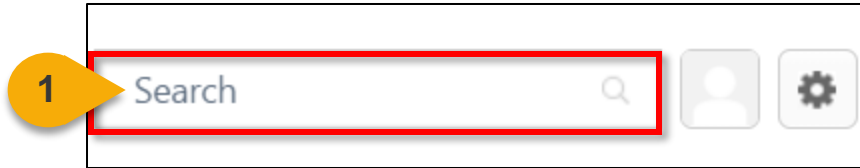
Certifications



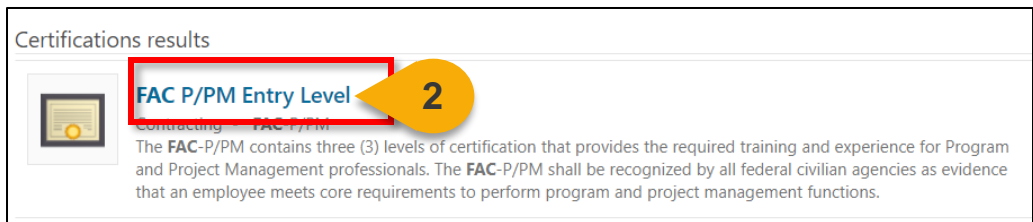
Request and Manage a Certification

When you want to request a Certification...

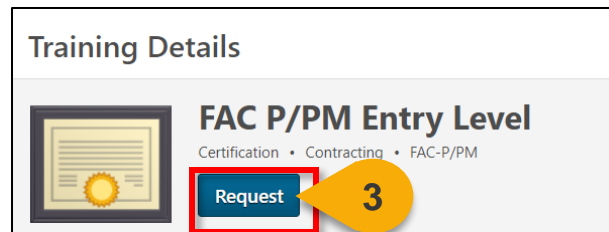
Step 1: In **Global Search**, type in the Certification you wish to request and click the **Magnifying Glass**.



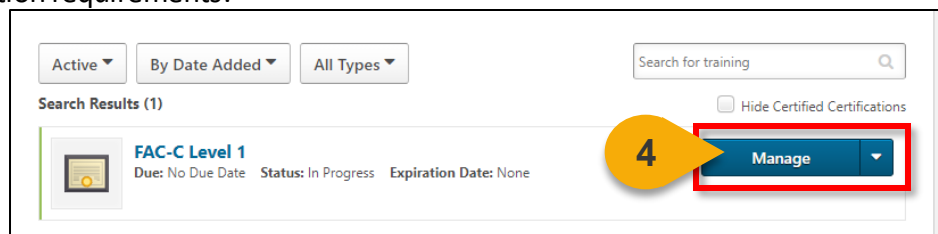
Step 2: Click on the Certification you'd like in the results.



Step 3: Click the **Request** button for the Certification of your choice.

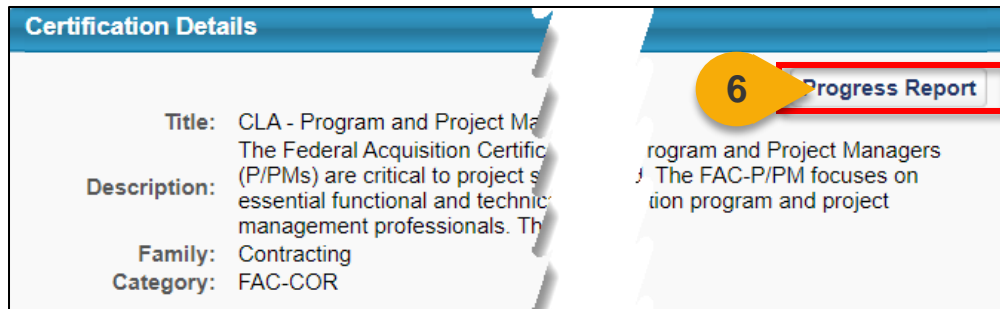


Step 4: You will be directed to your Transcript page. The Certification will be listed on the screen under Active courses with "In Progress" status. Click **Manage** to view the Certification requirements.



Request and Manage a Certification (Cont.1)

Step 6: From the Certification Details page, you can see what training needs to be completed to satisfy the certification requirements by clicking **Progress Report**.



Certification Details

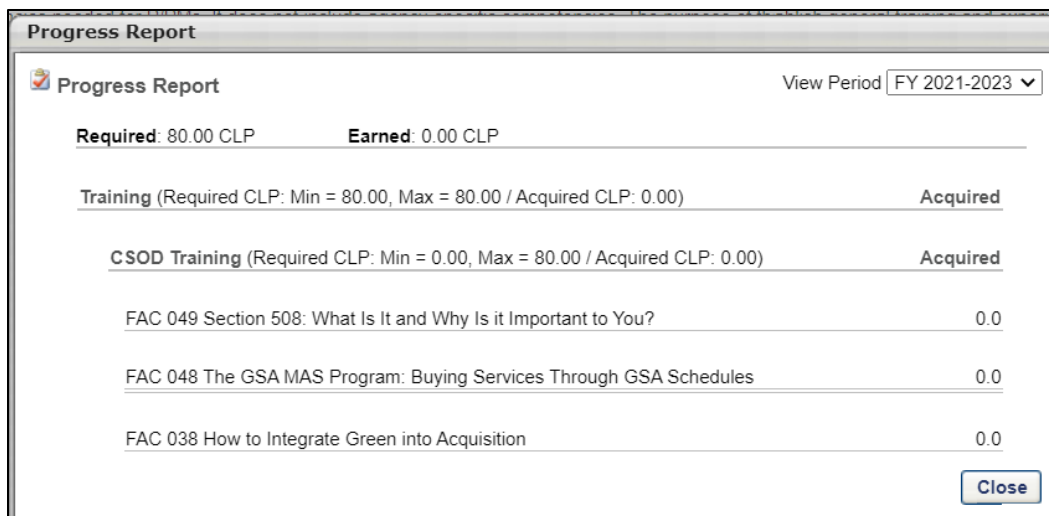
Title: CLA - Program and Project Management
The Federal Acquisition Certification (P/PMs) are critical to project success. The FAC-P/PM focuses on training program and project management professionals. The

Description:

Family: Contracting
Category: FAC-COR

6 **Progress Report**

A popup window will appear that displays the required CLPs, the CLPs earned so far, and list of trainings needed to complete the certification.



Progress Report

View Period: FY 2021-2023

Required: 80.00 CLP **Earned:** 0.00 CLP

Training (Required CLP: Min = 80.00, Max = 80.00 / Acquired CLP: 0.00)	Acquired
CSOD Training (Required CLP: Min = 0.00, Max = 80.00 / Acquired CLP: 0.00)	Acquired
FAC 049 Section 508: What Is It and Why Is it Important to You?	0.0
FAC 048 The GSA MAS Program: Buying Services Through GSA Schedules	0.0
FAC 038 How to Integrate Green into Acquisition	0.0

Close

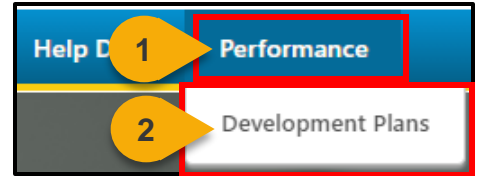
Individual Development Plans



Create an IDP

When you want to create an IDP...

Steps 1 & 2: Hover over **Performance** and click on **Development Plans**.



Step 3: Click on the **Create New Plan** button.



Step 4: Add a **Plan Title** and **Description** to your IDP.

A screenshot of the 'Create a Plan' form. At the top, there is a breadcrumb trail: 'Home > Snapshot > Dev Plan List > Create a Plan'. Below this is the title 'Create a Plan'. Underneath is the section 'General Information'. It contains two fields: 'Plan Title*' and 'Description'. The 'Plan Title*' field has the text 'Management and Leadership Development' entered. The 'Description' field has a rich text editor with various formatting options (bold, italic, underline, etc.) and the text: 'Develop skills in the areas of program management and task delegation in order to improve leadership skills. This will be done by: - Shadowing Senior Associates - Taking internal and external training courses on mangement and leadership skills - Joining efforts on the job that allow for demonstration of program management'. A yellow circle with the number '4' points to the 'Plan Title*' field, which is highlighted with a red rectangular box.

Step 5: Click on the **Add Objective** button in the Development Objectives section.

A screenshot of the 'Development Objectives' section. It has a light grey background. At the top, there is a blue icon of a document with a plus sign. Below the icon, there is text that says: 'There are no development objectives. Would you like to add one?'. At the bottom, there is a blue button with white text that says 'Add Objective'. A yellow circle with the number '5' points to this button, which is highlighted with a red rectangular box.

Create an IDP (Cont. 1)

Step 6: Enter an **Objective Title**.

Add Development Objective

Development Objectives represent what you need to learn or do in order to complete your development plan.

Objective Title

What skills would you like to develop?

6

Step 7: Select a category from the **Category** dropdown.

Add Development Objective

Development Objectives represent what you need to learn or do in order to complete your development plan.

Objective Title

What skills would you like to develop?

Category

Development Objectives

7

Step 8: Add **Development Actions**. Under Learning and Development there are three options you can utilize to add training/development actions to your Objective: **Search for Training**, **Browse Recommended**, and **Add Development Action**.

Learning and Development

8

Search For Learning

Find learning opportunities to help you achieve your objective.

Browse Recommended

Browse learning and development actions that are recommended for you.

Add Development Action

Create your own actions to make your objective happen.

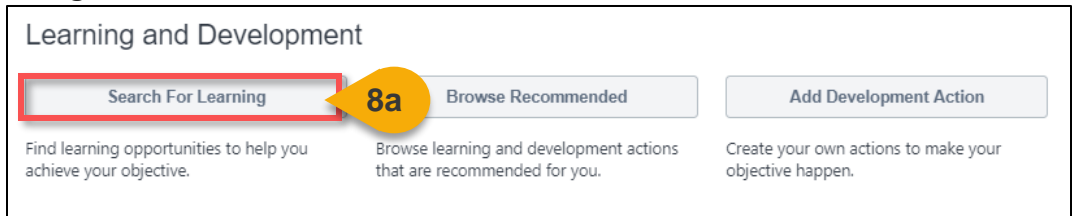
Search for Learning:
Encompasses training sessions provided. It allows you to select online sessions.

Browse Recommended:
Allows you to select learning and development courses.

Add Development Action:
Free text that allows you to add any external training or action item you wish to include in order to develop yourself professionally.

Create an IDP (Cont. 2)

Step 8a: To add training courses available online in Cornerstone, click on **Search For Learning**.

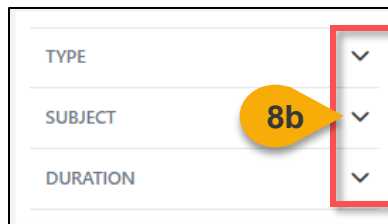


Learning and Development

Search For Learning **8a** Browse Recommended Add Development Action

Find learning opportunities to help you achieve your objective. Browse learning and development actions that are recommended for you. Create your own actions to make your objective happen.

Step 8b: All the available courses will be displayed on the screen. To filter the results displayed, click on the **arrows next to the filter options** to the left of the page.



TYPE

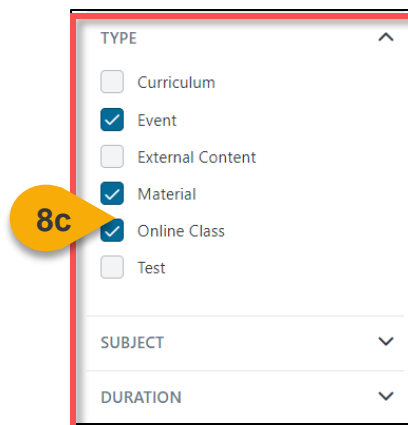
SUBJECT

DURATION

8b

Step 8c: The filter options will expand on the screen. Select the filter you wish to apply by clicking on the **checkboxes** next to each option.

The results will be updated on the screen based on the filters you select.



TYPE

☐ Curriculum

☒ Event

☐ External Content

☒ Material

☒ Online Class

☐ Test

SUBJECT

DURATION

8c

Create an IDP (Cont. 3)

Step 8d: You may also search for a specific training course using the **Search bar**.

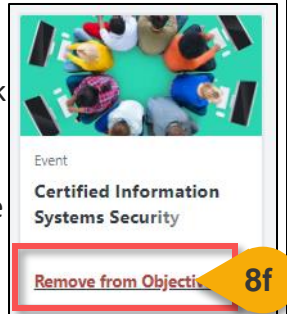
8d

Search For Learning

Step 8e: Select the **Add to Objective** link beneath any training you want to add. Multiple training courses can be selected.



Step 8f: If you change your mind, simply click on **Remove from Objective** and the course will be removed from your IDP.



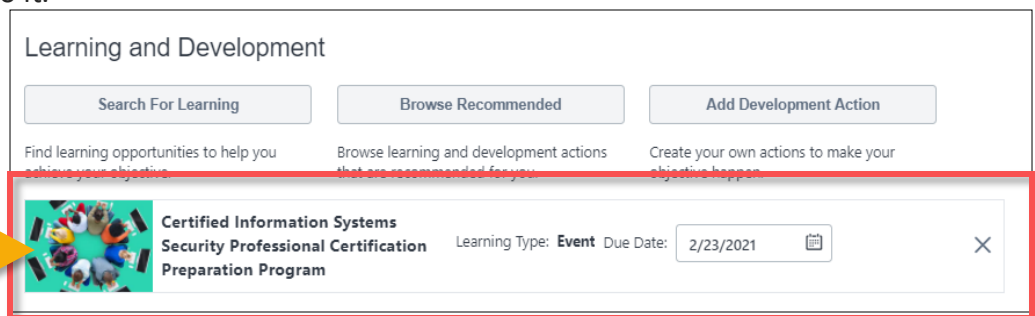
Step 8g: Once you are done selecting the training courses to be added to your Objective, click **Return to Objective** at the bottom of the page.

8g

Return to Objective

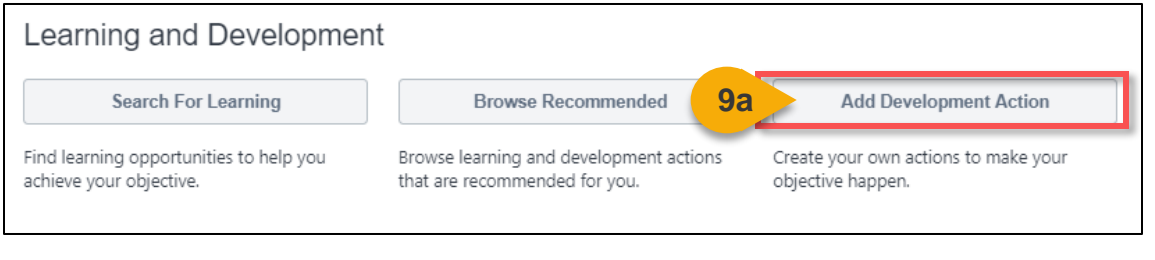
Step 8h: The course(s) selected will appear on the main **Objective** screen. By default, the training due date is set up to be due 6 months from now, but this date is editable. Notice that the training can be removed from your Objective by clicking on the **X** icon next to it.

8h



Create an IDP (Cont. 4)

Step 9a: To add action items not in the CSOD catalog to your IDP Objective, click on **Add Development Action**.



Learning and Development

Search For Learning Browse Recommended **9a** Add Development Action

Find learning opportunities to help you achieve your objective. Browse learning and development actions that are recommended for you. Create your own actions to make your objective happen.

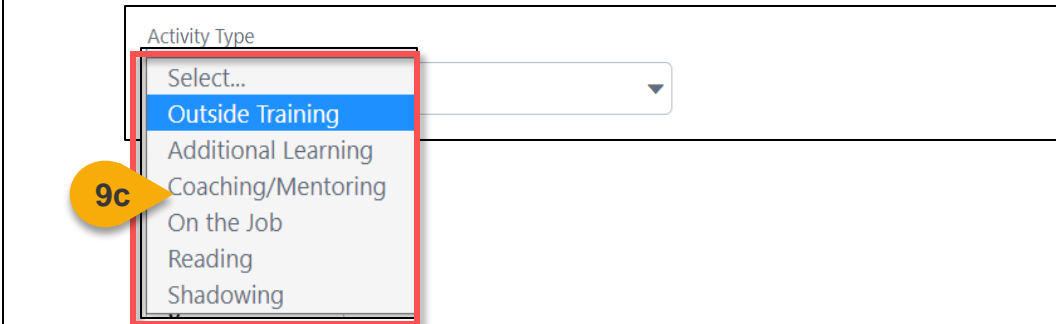
Step 9b: A pop-up window will appear on the screen. You must add a description to your development action in the **Description** field.



Development Action

Description* **9b**

Step 9c: Select the **activity type** from the Activity Type dropdown menu.



Activity Type

Select... **9c**

Outside Training

Additional Learning

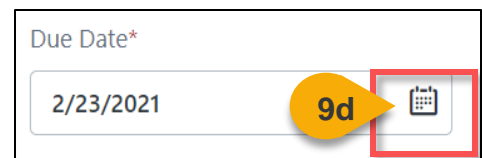
Coaching/Mentoring

On the Job

Reading

Shadowing

Step 9d: Confirm the due date for the development item. By default, the due date is set up to be due 6 months from when you first create this item. To change the due date, click on the **calendar icon** in the Due Date field, or simply type in the date.

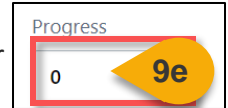


Due Date*

2/23/2021 **9d**

Create an IDP (Cont. 5)

Step 9e: Update the **Progress** you have made as applicable. This is a percentage, but you don't need to type "%", just the number, e.g., for 25%, type in "25".

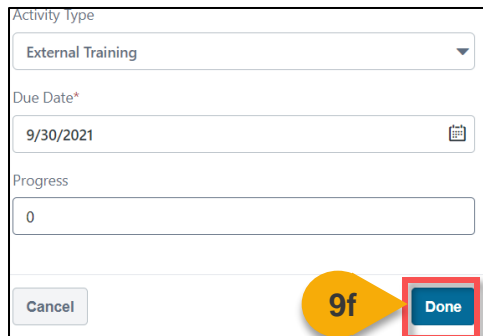


Progress

0

9e

Step 9f: Click **Done** to add the activity to your IDP.



Activity Type

External Training

Due Date*

9/30/2021

Progress

0

Cancel

Done

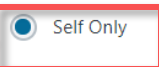
9f

Step 10: Under Assignment, select **Self Only** to assign this IDP to yourself. If you are a Supervisor, you can assign this IDP to your employees. To assign IDPs to employees, view the Manager task aids.

Assignment

Select the criteria that defines who will be included in this assignment

10



☒ Self Only

Step 11: To assign this IDP as your primary IDP (you can have multiple IDPs), check the box next to **Designate this as the Primary Plan for assignees**.

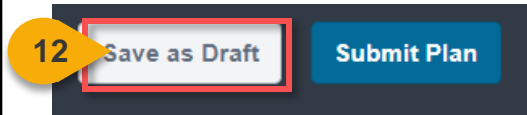
11



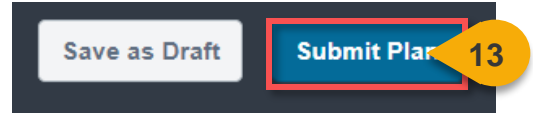
☒ Designate this as the Primary Plan for assignees

Create an IDP (Cont. 6)

Step 12: To save the plan as a draft and return to it later, click **Save as Draft**.



Step 13: To submit the plan for Manager approval, click **Submit Plan**.



Primary IDPs should be utilized as the main formal development plan for the employee. However, if the Employee would like to have other secondary development plans, they can create more IDPs, which will be listed under Other Plans.

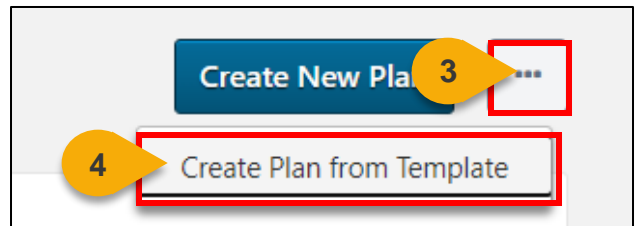
Create an IDP from a Template

When you want to create an IDP using a template...

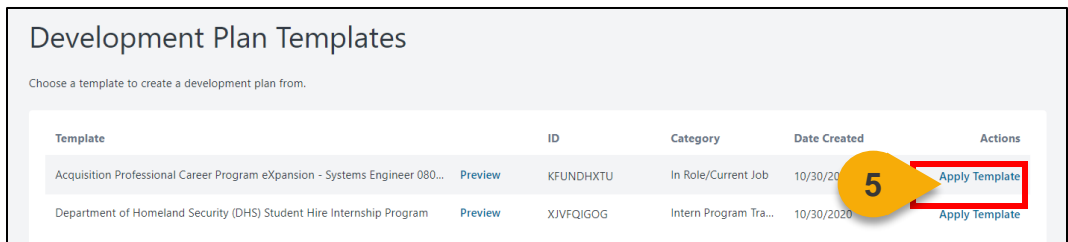
Steps 1 & 2: Hover over **Performance** and click on **Development Plans**.



Steps 3 & 4: Click on the **ellipsis** and then choose **Create Plan from Template**.



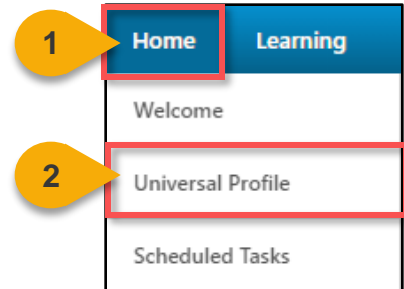
Step 5: Select the template you want to use and click **Apply Template**. You can edit the template or submit it for approval as-is.



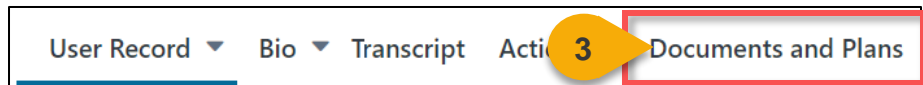
Update IDP

When you want to update an IDP Objective, Training or Action Step...

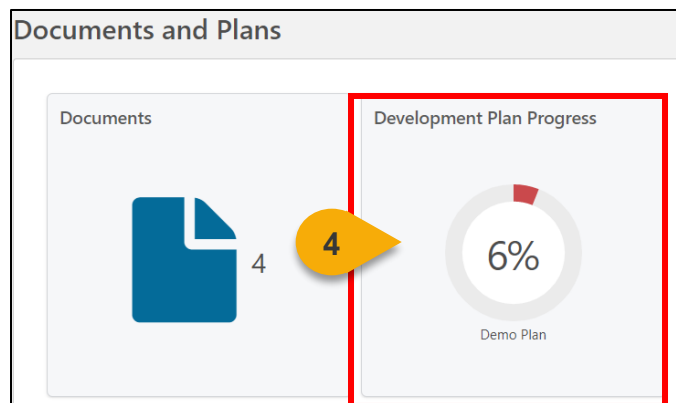
Steps 1 & 2: Hover over **Home** then navigate to **Universal Profile**.



Step 3: Click on the **Documents and Plans** tab.



Step 4: Click on the **Development Plan Progress** widget.

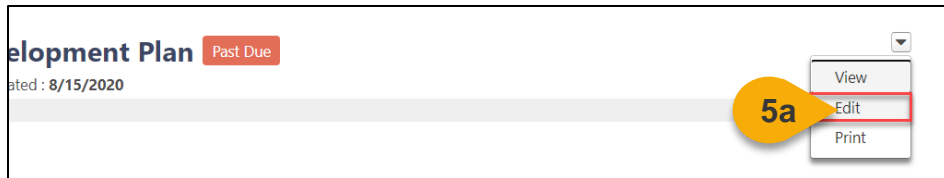


Note: You can also navigate to the IDP using the Performance tab and then clicking on Development Plans.

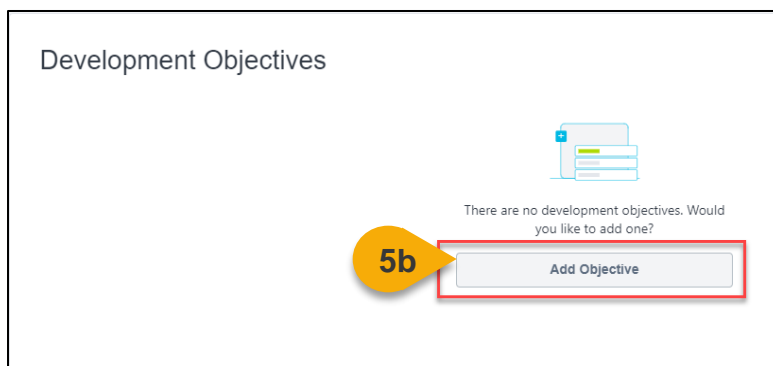
Update IDP (Cont. 1)

If you wish to add a new Objective to your IDP, follow steps 5a – 5b below.

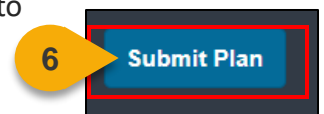
Step 5a: Select the dropdown icon **Edit** option next to the IDP to which you want to add a new Objective.



Step 5b: Click on the **Add Objective button** and create the new Objective (see Creating IDPs task aid for further assistance).



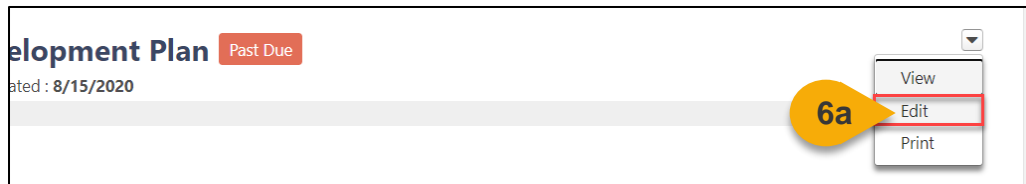
Step 6: Click on the **Submit Plan** button when you are ready to resubmit your plan for approval.



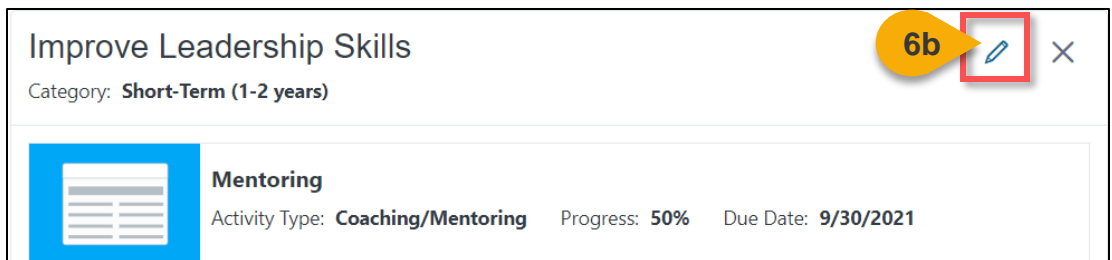
Update IDP (Cont. 2)

If you only wish to update a Training or Action Step on an Objective in your IDP, follow the steps 6a – 6g on the following pages.

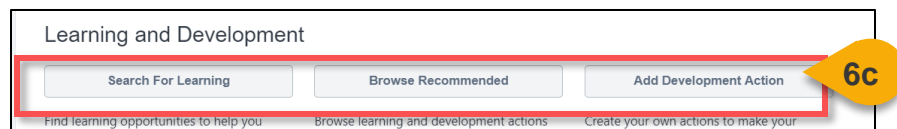
Step 6a: Select the dropdown icon **Edit** option next to the plan with the Objective you want to update.



Step 6b: Select the **Edit** icon next to the Objective for which you want to update Training or Actions Items.



Step 6c: To add training or Development Actions, choose from the options within **Learning and Development**.



Update IDP (Cont. 3)

Step 6d: You can edit Development Actions by clicking on the **Edit** icon next to it. When in editing mode, you can update anything in the Development Action, including its progress. You can only cancel IDPs after they've been approved.

Learning and Development

Search For Learning Browse Recommended Add Development Action

Find learning opportunities to help you achieve your objective. Browse learning and development actions that are recommended for you. Create your own actions to make your objective happen.

Attend Leadership Conference in San Diego, CA Activity Type: **Outside Training** Progress: **0%** Due Date: **2/23/2021**

Step 6e: For training courses that are NOT Development Actions, you may update the due date by clicking on the **Due Date field** or delete it by clicking on the **X icon** next to it. Training course completions will be updated automatically as you complete these training courses on your transcript.

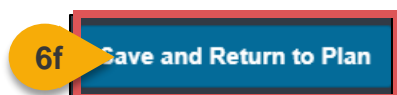
Learning and Development

Search For Learning Browse Recommended Add Development Action

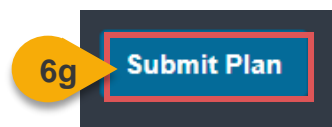
Find learning opportunities to help you achieve your objective. Browse learning and development actions that are recommended for you. Create your own actions to make your objective happen.

Attend Leadership Conference in San Diego, CA Activity Type: **Outside Training** Progress: **6e** **2/23/2021**

Step 6f: Once all the changes have been made to your IDP's Objective, click on the **Save and Return to Plan**.



Step 6g When ready, click **Submit Plan** to resubmit the IDP for approval.



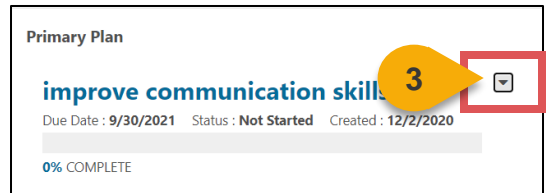
Cancel IDP

When you want to cancel an IDP...

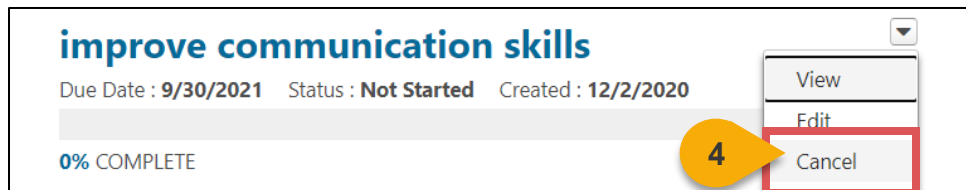
Steps 1 & 2: Hover over the **Performance** tab and then click **Development Plans**.



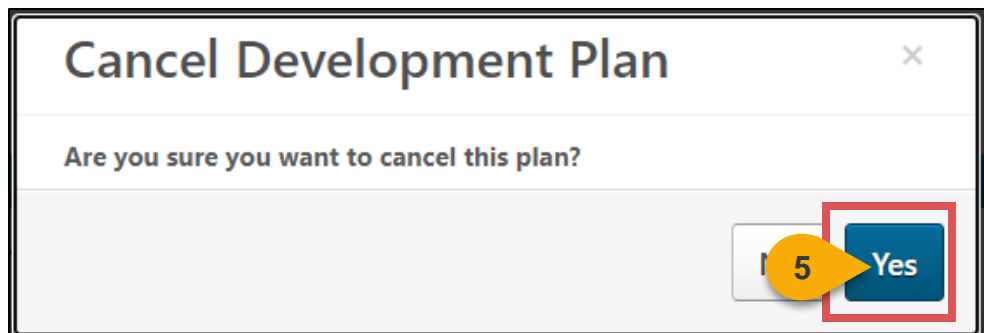
Step 3: Click the **dropdown arrow** next to the plan you would like to cancel.



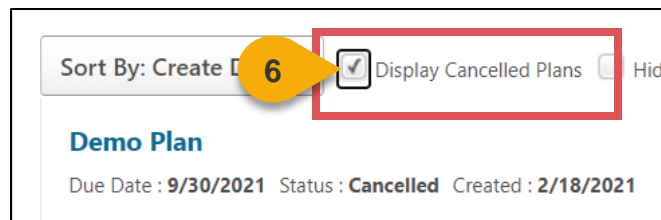
Step 4: Select **Cancel** from the dropdown menu.



Step 5: A popup will appear. Select **Yes** to cancel the IDP.



Step 6: Click the **checkbox** for Display Cancelled Plans to view the IDP you cancelled.



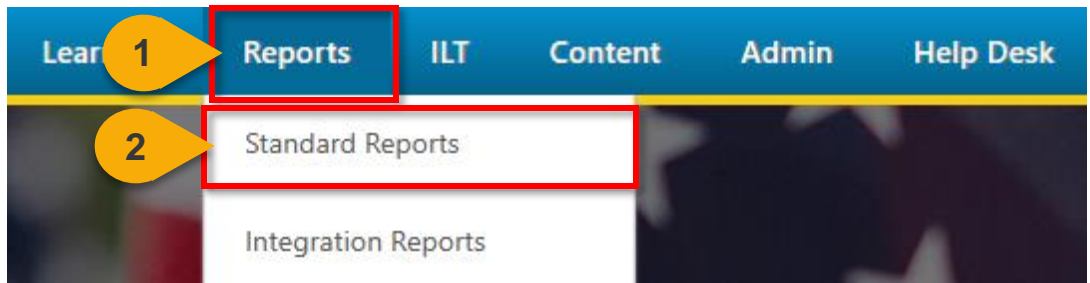
Reports



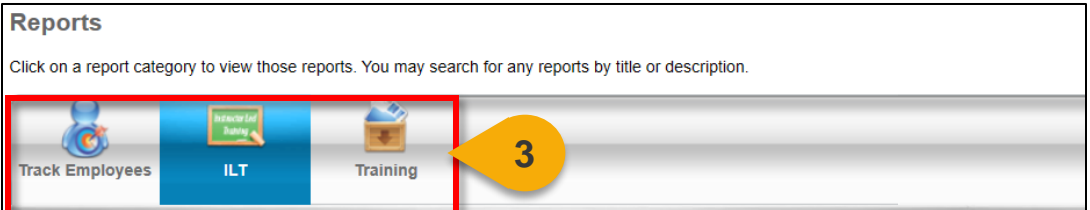
View Standard Reports

When you want to view Standard Reports...

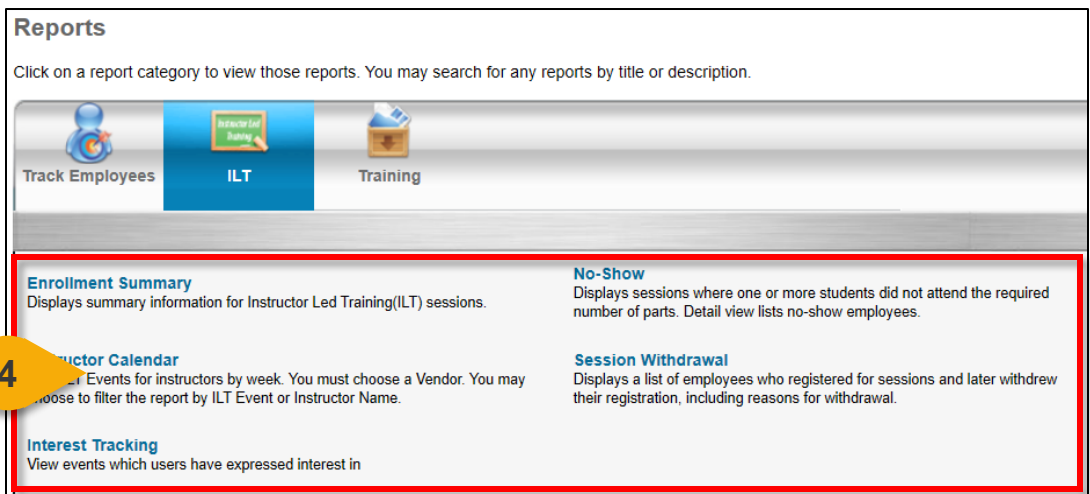
Steps 1 & 2: Hover over the **Reports** tab and then click **Standard Reports**.



Step 3: Choose the **Report Category**.



Step 4: Select the type of report you would like to view by clicking on the **name of the report**.



View Standard Reports (Cont.1)

Step 5: Enter **data** into the filters you would like to apply to the report. The filters available will vary depending on the report selected. The system will alert you if you try to run a Standard Report with required fields missing.



Enrollment Summary
View summary information for Instructor Led Training (ILT) sessions.


Date Filters



Date Criteria: From: To:



Advanced Filters

5




Facility :  

Vendor : 

Instructor :  (Please Select Vendor First) 

Event :  

Locator Number :

 [Printable Version](#)  [Export to Excel](#)  [Export to Text](#)

Step 6: Choose how you would like the report to export: **Printable Version**, **Export to Excel**, or **(when available), Export to Text**. The file will download to your computer.



Enrollment Summary
View summary information for Instructor Led Training (ILT) sessions.


Date Filters



Date Criteria: From: To:



Advanced Filters

6




Facility :  

Vendor : 

Instructor :  (Please Select Vendor First) 

Event :  

Locator Number :

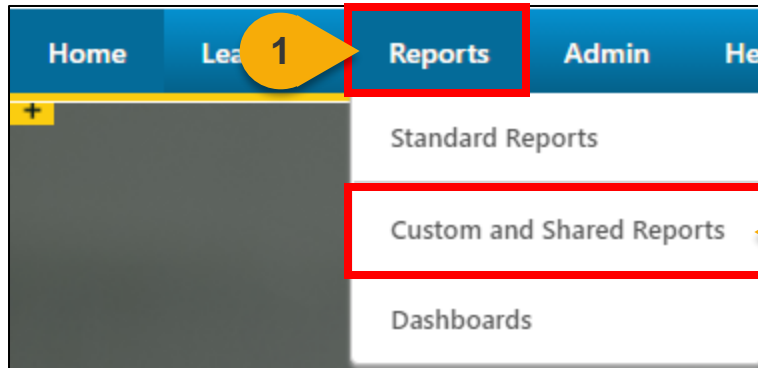
 [Printable Version](#)  [Export to Excel](#)  [Export to Text](#)

Note: Click “Yes” to open the Excel option after the download has completed.

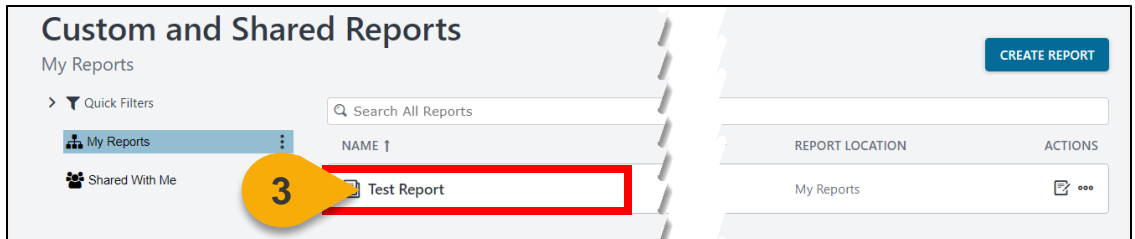
View Custom Reports

When you want view custom or shared reports...

Steps 1 & 2: Navigate to **Reports**, then select **Custom and Shared Reports**.

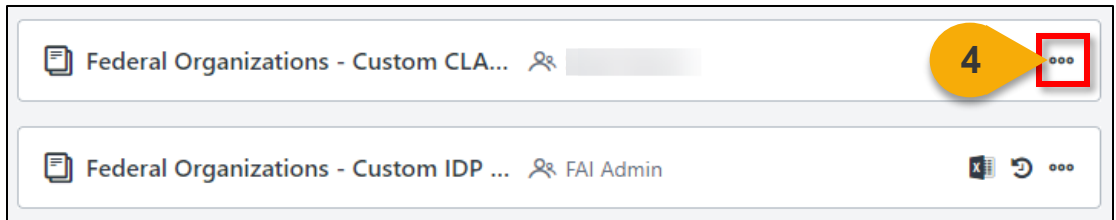


Step 3: You will arrive at the Custom and Shared Reports page. Here you will see all custom reports that you have created. Click on the **title** of the report to view it.

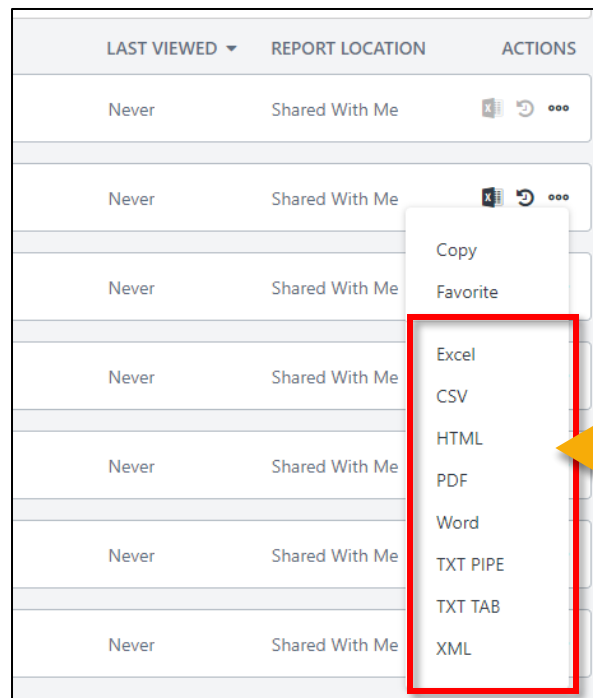


View Custom Reports (Cont.1)

Step 4 To see other report format options, click the **ellipses (...)** icon.



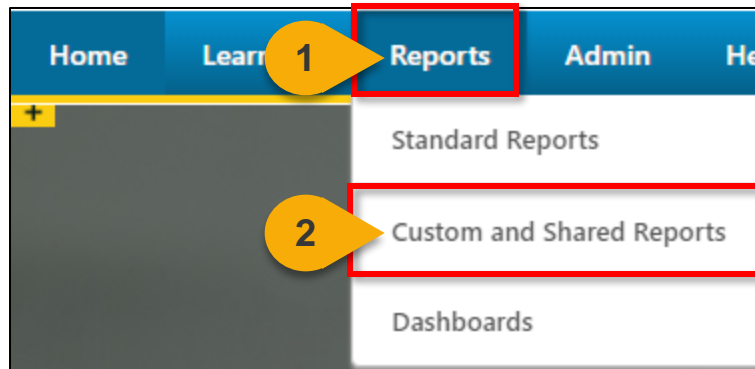
Step 5: Click the **file format** you wish to download. It will download to your computer.



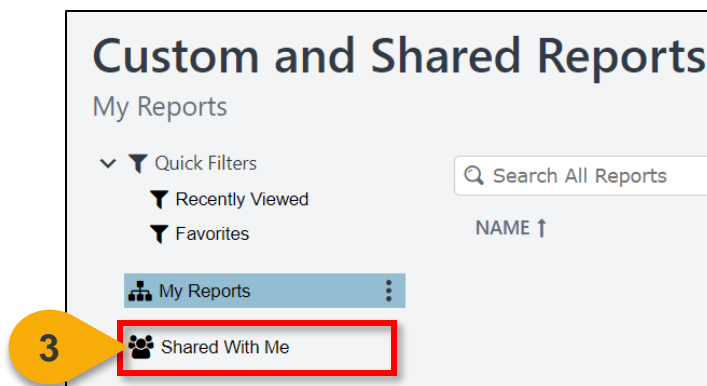
Filter and Download Custom Reports

When you want to filter and download a report...

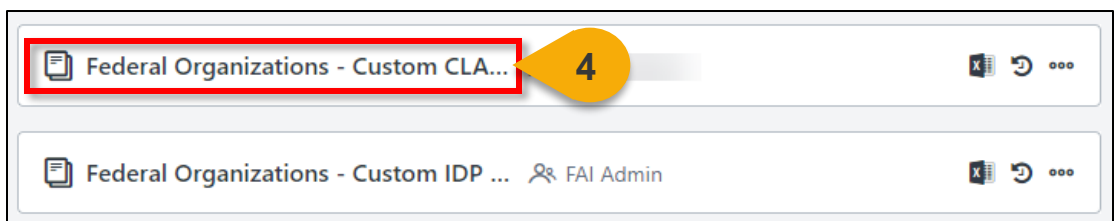
Steps 1 & 2: Navigate to the **Reports** tab and then select **Custom and Shared Reports**.



Step 3: On the left-hand side of the screen, click **Shared With Me** to see reports that have been shared with you.



Step 4: Click the **Report Name** you want to view to update the report filters.



Filter and Download Custom Reports (Cont. 1)

Step 5: Update the **filters** as needed. The filters will vary based on the report.

▼ Filters

6

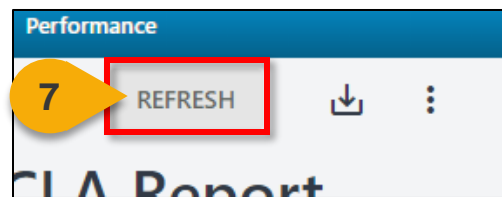
Certifications - Certification Category is equal to FAC-C Continuous Learning

AND

Certifications - Certification User Status is one of Select...

Calculated Fields - Days Until Certification Period Due is greater than 0

Step 7: Click **Refresh** in the top right corner to see a sample of the newly-filtered report on the bottom portion of the page.



Step 8: Click the **Download Options** icon in the top right corner to see the formats available for this report.



Step 9: Choose the **File Format** in which you would like to download the report. The report will download to your computer.

